



# User Manual

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This user manual is intended for use by club and association members that are currently signed up to use the ClubExpress service, to help them maximize their use of and benefit from the ClubExpress platform. It is also intended for use by club and association officers who are evaluating the platform as a potential solution for their membership, web site and communications needs.

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## Chapter 1 – Introduction

Welcome to ClubExpress, the most powerful tool on the Internet for managing hobby and enthusiast clubs, sports and leisure clubs, social clubs, homeowner and condo associations, fraternities and alumni clubs, community service clubs, and professional and trade associations of all kinds.

ClubExpress was designed to allow clubs and associations to move their administration entirely online. ClubExpress handles your organization's membership database, signups and renewals, committees, documents, discussions, event calendar and registration and financial management using the Internet.

Every club or association that signs up for ClubExpress gets its own web site with content for visitors that promotes the organization and its activities. Members log in to see members-only content, including a complete membership directory and profile. Other functions such as discussion forums are also reserved for members-only. When administrators log in, they have access to additional functions for managing the organization, including financial tracking, web site configuration, event management and other tasks.

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### ***THIS USER MANUAL***

This user manual is designed for club or association members only. It does not include discussion of coordinator and administration functions, which are described in a separate manual.



Some functionality within ClubExpress applies only to clubs that have chapters, districts or regions, subgroups within the main club or association. If your club does not have these subgroups, this functionality will be completely hidden. If functionality applies to subgroups, it is described with the icon to the left.



Within ClubExpress, every screen also includes a link to an online help system that includes all of the material in this manual. There is also instruction text on many screens.

And if anything is not clear, you are always welcome to call us toll-free at 1-866-HLP-CLUB (866-457-2582) and we will gladly explain what you need to know.

## Chapter 2 – Screen Orientation

### INTRODUCTION

This chapter describes the various components of a ClubExpress screen. Figure 2.1 below shows a typical screen, with the major components highlighted.

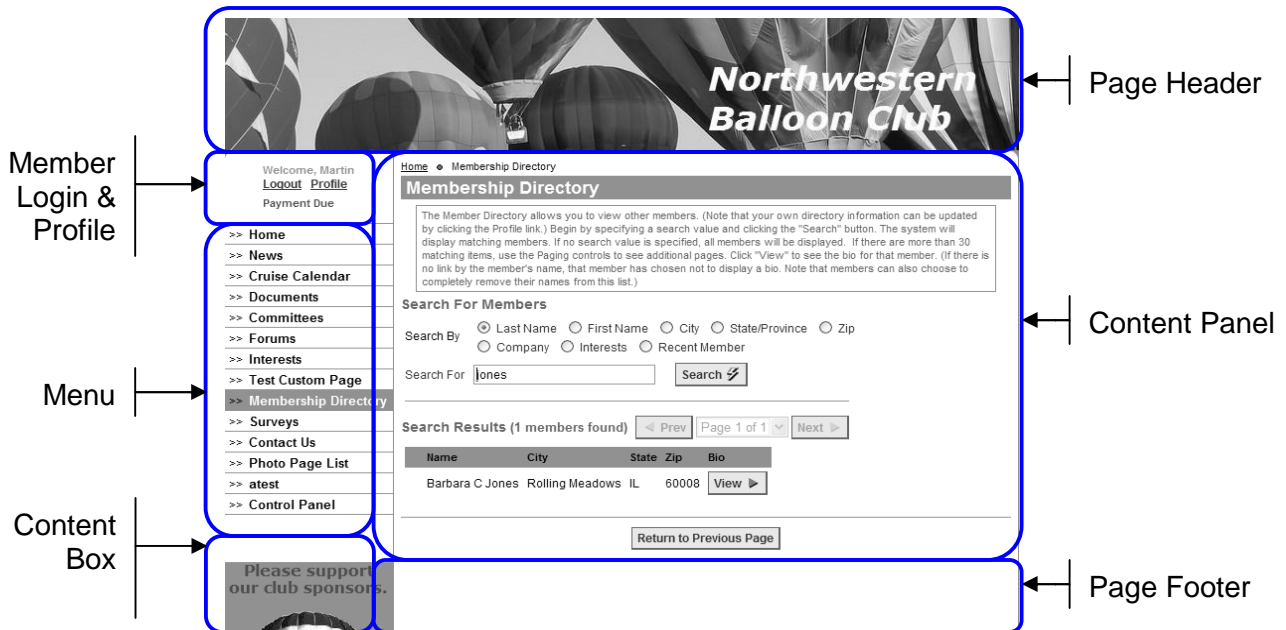


Figure 2.1 – ClubExpress screen

### PAGE HEADER

Every page within an organization's web site has a standard header. This header usually runs the full width of the page (although this is not required.) It can be any height although it is usually advisable to keep the header no more than 125-130 pixels in height so that it doesn't dominate the page. ClubExpress includes a custom designer to build this header.

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## **MEMBER LOGIN & PROFILE**

Every page also includes a login panel. In the example above, this is a small rectangle on the left side, under the page header and above the menu. Other templates may have it in different positions and with different dimensions (for example, as a narrow strip across the top of the page, above the page header.)

This panel has multiple configurations:

- Site visitors and members who have not yet logged in will see the phrase **Member Login**. Clicking this link brings up the login page, allowing members to log into the site and view content reserved for members only.
- Members who have logged in will see a “Welcome <first name>” message. The Login link is replaced by two links: one to **Logout** and the other to jump to the member’s personal **Profile** page (see page 15).
- Members who log in and whose membership is up for renewal will see an additional **Renew** link. This is a shortcut to the renewal wizard, allowing members to renew their membership with only a couple of mouse clicks.
- If your membership has expired, you can still log in. You will be taken to the first page of the renewal wizard from where you can renew (or log out; any other click will return you to this page.)
- Members who have pending transactions will see a **Pending Payments** link. This is a shortcut to the Payments screen, allowing members to complete any pending payments.
- Your club or association may have enabled a **My Directory Listing** option. Clicking this link takes you to your bio page in the Membership Directory. From this page, you can edit the various elements of your directory entry, including your contact information, bio and answers to club-specific questions.

---

## **MENU**

Every page includes a series of links to jump to other portions of your organization’s web site. This is the navigation menu and it will generally be in one of two positions: vertically oriented along the left side of the screen; or horizontally oriented along the top of the screen. ClubExpress supports different menus for public users and members after they have logged in, and even different menus based on your member type. ClubExpress also supports sub-menus; an arrow will indicate that there are additional choices below that item.

---

## **CONTENT PANEL**

The main section of the website is the content panel. This is where pages and all custom content are displayed. It may contain text, images, tables, and other standard website elements.

Along the top edge of the content panel is a crumb trail.<sup>1</sup> This trail lists the logical path of pages from the home page to the current page. (Note that this may not be the actual path that a user has followed, since the various modules within ClubExpress are closely coupled to each other.) Each entry on the crumb trail except for the last one (representing the current page) is a link, allowing you to backtrack to an earlier page.

Under the crumb trail but above the module heading is a message area. In most instances, this area will be blank. Error messages appear in red while status and general informational messages appear in blue (or a similar “non-cautionary” color based on the current template, theme and style sheet.)

### Social Networking Links

In the lower left corner of the Content Panel, you may see links to popular social networking sites, including Facebook, Twitter, LinkedIn, and MySpace. You may also see a generic “Share This” panel with links to other content sharing websites (Digg, Mixx, de.licio.us, etc.) as well as a standard “Like” icon to like the current club page on your personal Facebook page.

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<sup>1</sup> The crumb trail is named after the story of Hansel and Gretel, who left a trail of breadcrumbs into the forest to help them return after being abandoned by their wicked stepmother.

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## **PAGE TOOLS WIDGET**

Floating on the right side of the website is the Page Tools Widget



*Figure 2.2 – Page Tools Widget*

This widget appears on every page and may have between four and six icons. The dotted section at the top can be used to click and drag the widget to a different position on each page.



The first icon (“question mark”) displays the context-sensitive help system, providing instructions for the current page or module.



The second icon (“printer”) provides a “Print this page” function.



The third icon (“AA”) expands text on the current page to make it easier to read for older readers and others with reduced eyesight.



The fourth icon (“up arrow”) jumps to the top of the screen.



Selected pages may also display a “magnifying glass” icon, providing Search tools specific to that page. Over time, we will enable this icon in additional places.



Users with admin rights over a page or function may see a “pencil” icon at the end of the list, allowing them to jump to the Admin side of the function or to edit the content of the page.

---

## ***CONTENT BOX***

Some ClubExpress templates include additional areas which your club or association is using to list sponsors or upcoming events or other content which should appear on every page.

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## ***PAGE FOOTER***

Every page also includes a standard footer with the following elements:

- A link to the Home page
- A link to the Contact Us module
- A link to the standard Terms of Use for the web site (which appears in a popup window.) When a club or association signs up for ClubExpress, it agrees on behalf of its members to abide by these terms of use.
- A link to the standard Privacy policy in effect for this site (which also appears in a popup window.) When a club or association signs up for ClubExpress, it agrees on behalf of its members to abide by this privacy policy.
- A small notice from ClubExpress. This is also a link that brings up the *clubexpress.com* web site in a separate window.

## ADD ME TO YOUR MAILING LIST

Clubs and associations have the option of enabling an *Add me to your Mailing List* prompt on the public side of their websites. Clicking this link displays the following popup form:

**Add Me To Your Mailing List**

Complete the information below to be added to our mailing and emailing list. Click "Save" when finished, or "Cancel" to return without saving.

First Name

Last Name

Email Address

---

Address 1

Address 2

City

State/Province

Zip/Postal Code

Country  [Show All Countries](#)

---

Phone

Cell Phone

Fax

---

Title

Organization

---

How did you hear about us?

Category ☐ Guest

☐ Scholarship Award Alumni

Select the category or categories that best describe you.

Figure 2.3 – Add me to your Mailing List

Users enter their basic contact information and how they heard about your club or association. They may optionally self-select themselves into one or more mailing list categories that you have defined and flagged to be visible. When they click **Save**, their information is added to the non-member database and they are assigned to the categories they have checked.

## Chapter 3 – Logging In

### INTRODUCTION

Every member has his or her own account in ClubExpress. When a web site is first displayed, the Login link allows members to login into their accounts with a user name and password and to access member's only features. Members who forget their password can retrieve it with a standard secret question and answer mechanism.

### LOGGING IN

Clicking the **Login** link displays the following screen:

Figure 3.1 – Login Page

Enter your user name and password and click the **Login** button. Click **Cancel** to return to the home page.

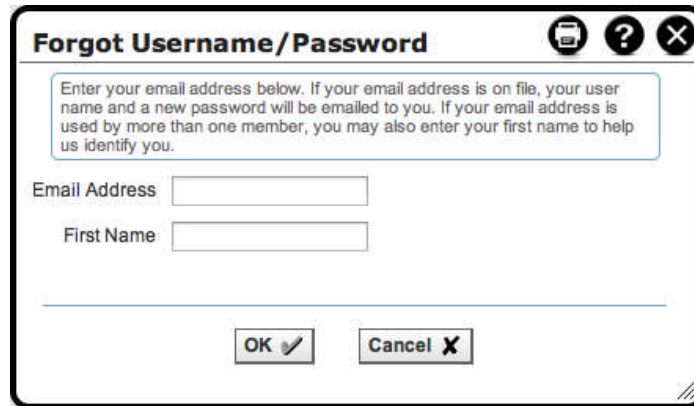
If you check the **Remember Me** option, the system will store a cookie on your computer that allows you to login without having to enter your user name and password each time. This cookie is secure; it does not contain your actual user name and password. But you should only select this option on a computer that you control, so that others cannot log in as if they were you.

To cancel the Remember Me option, once you have logged in, click the **Profile – Username/Password** link. Re-enter your password, then uncheck the option and save.

---

## ***RETRIEVING A LOST USERNAME/PASSWORD***

If you forget your username or password, click the **Forgot My Username/Password** button. The following popup window is displayed:



**Forgot Username/Password**

Enter your email address below. If your email address is on file, your user name and a new password will be emailed to you. If your email address is used by more than one member, you may also enter your first name to help us identify you.

Email Address

First Name

*Figure 3.2 – Retrieving a Lost Username and Password*

The system will prompt you to enter your email address and first name. When you click **OK**, the system will search for this information in the club's membership database. If one matching record is found, the username and a new temporary password is generated and sent to the email address on file. You will need to retrieve this information before you can log in, and the system will then give you the chance to change it.

If no match was found, or if multiple matches were found, the system cannot generate a new temporary password. If this happens, or if your email address is no longer valid, call a club or association officer or ClubExpress toll-free on (866) 457-2582 to have your password reset manually.

## Chapter 4 – Member Profile

---

### ***INTRODUCTION***

The Member Profile system is where you modify your personal information and preferences as a member of the club or association. Here you can update:

- Name
- Address
- Phone numbers, email address and web site
- User Name and Password
- A complete history of transactions done through the system
- A complete history of payments made to the club
- Whether your credit card is stored (securely) by the system
- The information in the member directory
- Links to social networking websites such as Facebook and LinkedIn
- Your answers to additional questions asked by the club or association
- Your Interests
- Your Achievements (if this option is enabled for your association)
- Preferences and subscriptions in discussion forums
- Secondary and/or tertiary member accounts if you are a Primary member
- Resign your membership if it was configured for automated charging

Your club or association may also allow additional information to be stored, including an alternate address, work information, your date of birth, etc. As ClubExpress is enhanced, additional menu choices will be added to the Member Profile system to reflect these options.

---

### ***ACCESSING YOUR MEMBER PROFILE***

To access your Member Profile, you must first log in using your Username and Password. Click the **Login** prompt near the top of the screen. Once you have logged in, this prompt is replaced with a welcome message and two additional prompts: **Logout** and **Profile**. Click the Profile prompt to enter the Member Profile. You will see the following screen.

The screenshot shows a web interface for a 'Member Profile'. At the top, there's a navigation bar with 'Home' and 'Member Profile' links. Below this is a blue header with the title 'Member Profile'. The main content area is divided into several sections, each with a tabbed heading:

- Membership Summary**: Contains 'Type: One Year Renewal', 'Status: Active', 'Exp. Date: 12/31/2014', 'Join Date: 12/19/2006', and 'Last Renewal: 10/22/2012'.
- Personal Info**: Includes 'Contact Info', 'Additional Member Data', 'Member Directory', 'Chapters/Additional Members', and 'Achievements'.
- Website**: Includes 'User Name / Password', 'Interests', 'Photo Albums', and 'Download Bank'.
- Financial/Historical Data**: Includes 'Transaction History', 'Payment/Credit History', 'Credit Card', 'Event History', and 'Optional Additional Charges'.
- User Manual**: Includes a link to 'Download version 5.4 Final (3.3 MB - Updated 11/19/2012)', a note '(PDF format - requires Acrobat viewer)', and a 'Video: Updating your Member Profile' with links for '.MP4 Format' and '.MOV Format'.
- Forums**: Includes 'Forum General Preferences', 'Forum Memberships', and 'Thread Subscriptions'.

Figure 4.1 – Member Profile

At the top of the screen is a Membership Summary panel, showing your membership type and status, club join date, expiration date and date of last renewal. If it's time to renew, a red **Renew** link will be displayed; if you have a payment pending, a red **Payment Due** link will be displayed; and if you're a Trial member, a red **Upgrade Membership** link will be displayed. Each of these links can be clicked to launch the appropriate wizard or screen.

This screenshot shows a different view of the Member Profile page. At the top, a message box states: 'Your Member Profile tracks the personal information you entered into the system. Click on the headings to review or update the information shown. Changes are saved automatically.' Below this is a dark grey header with the title 'Member Profile'. Underneath, another message box says: 'Your membership dues are collected automatically from your credit card account. If you wish to cancel from the club and stop these payments, click the button to the right.' To the right of this message is a button labeled 'Cancel My Membership'.

Figure 4.1a – Member Profile with Automated Renewal and Payment

If your member type is configured for automated renewal and payment using a stored credit card, you will see a special panel at the top of the Profile allowing you to resign your membership and stop the charges. Click the **Cancel My Membership** button and confirm this action.

If you have a bad email address, a special notice will be displayed under the "Exp. Date" line. Click the link to deal with this email problem. (See the section at the end of this chapter for more information.)

The following choices are available: (Some may or may not appear depending on whether that option has been enabled by your club or association.)

### Personal Info

- Select **Contact Info** to modify your name, address(s), phone number(s), work information, and email address.
- Select **Additional Member Data** to provide answers to specific questions configured by your club or association. This option is only shown if your club or association has defined club-specific questions.
- Select **Membership Directory** to update additional information that is shown in the directory, including your bio, links to social networking websites and photo. This is also where you specify how much information to show to other members.
- Select **Chapters/Additional Members** to maintain and secondary and/or tertiary memberships associated with your membership. This option will only appear if your member type allows secondary and/or tertiary memberships and if you are the primary account holder. This screen is also the place to define your chapter assignments if your club or association supports chapters.
- Select **Achievements** to view your achievements within the organization. This option will only be visible if specifically enabled; it is read-only for you; entries can be made by an administrator.

### Financial/Historical Data

- Select **Transaction History** to view and print a list of your transactions (membership renewals, event registrations, purchases, etc.) through ClubExpress. This option may appear for secondary members if they have event registrations but it will never show membership renewals since the primary member handles these.
- Select **Payment/Credit History** to view and print a list of your payments made through the system, and a separate list of credits you have received.
- Select **Credit Card** to decide whether to store your credit card in the system (it's fully encrypted and very secure.) Credit cards are used to renew your membership, register for events and purchase club or association merchandise. This option does not appear for secondary members or for administrators editing profiles other than their own.
- Select **Event History** to view and print a list of events you registered for and attended (if attendance is being tracked.)

- Select **Optional Additional Charges** to purchase one or more of the club's additional charge options, which are otherwise only available during signup or renewal time.

## Forums

- Select **Forum General Preferences** to specify your general preferences for participation in discussion forums. This option is only shown if your club or association has enabled the Forums module.
- Select **Forum Memberships** to specify your preferences for individual forums, including whether you are subscribed to the forum and how or whether emails should be delivered.
- Select **Thread Subscriptions** to view current subscriptions and to unsubscribe from any threads from which you no longer wish to receive updates.

## Website

- Select **User Name / Password** to modify the user name and password used to log into the system. On the administrator version of the profile, this option is replaced with **Reset Password**.
- Select **Interests** to let other members know what expertise and interests you have within your club. This option is only shown if your club or association has enabled the Interests module.
- Select **Photo Albums** to upload photos and organize them into personal photo albums. This option will only appear if your club or association has enabled member-level photo albums.
- Select **Download Bank** to view any documents in your download bank. This option will only appear if your club or association has enabled the Storefront module, from which digital content can be purchased and downloaded.

## User Manual

Select this option to download a user's manual for ClubExpress. This manual is in Adobe Portable Document Format (PDF); there is also a link to a free Adobe reader.

Note that other options that are club-specific or association-specific may also be displayed. These options were programmed especially by ClubExpress for your organization allowing the database to store information that is unique to your organization. Click the link to display the custom content with its own instructions.

**RENEW**

Click the red **Renew** link to renew your membership. This choice only appears if your membership is up for renewal. You will be taken into the Member Renewal wizard, the first screen of which is shown below:

The screenshot shows a web interface for "Membership Renewal for Jon Harrison", labeled "Step 1 of 3". At the top, there is a breadcrumb trail: "Home ♦ Membership Renewal". Below the title bar, a text box provides instructions: "Use this screen to update this user's membership. The current membership type is shown below; make any necessary changes. The list of available membership types comprises all available types, including those which are not available to members when they join (such as complimentary memberships.) Then click the 'Next' button at the bottom of the page to continue to the next step." The form contains the following fields: "Membership Status" with the value "Expired 7/1/2004"; "Membership Type" with a dropdown menu showing "Family - \$40.00"; a note "All people living in a household."; and "New Expiration Date" with a date input field showing "12/29/2005" and a calendar icon. In the bottom right corner, it says "Current Total \$40.00". At the bottom center, there are two buttons: "Cancel X" and "Next ►".

Figure 4.2 – Renewal

Select a membership type and click **Next**. If your membership includes additional secondary and/or tertiary members, or if your association supports chapters, you will next be able to update this information, since it may affect the membership fee you are charged. If additional charges are defined, you will also have the opportunity to add them to your current total. You might also be asked to affirm the club's Joining Agreement. The next screen is the payment summary, giving you an opportunity to review the information entered. From this screen, you can proceed to the payment screen to complete the renewal.

## Payment


Click the **Finish and Proceed to Payment** button. A screen similar to the following will be shown:

Home • Control Panel • Pending Payments • Make Payment


### Make Payment for dan j nitzel (89)

The list below shows outstanding payments due for the current member. Use the checkboxes to select which payments to make. Then, make a choice in the "Select Payment Method" dropdown list. If paying by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for the transaction to complete.

If paying by check, enter the check number and adjust the payment date if necessary. Press the "Submit Payment" button.


Fields marked \* require an entry. Click  to change amount.

[Print Invoice](#)

☒ **Sign Up** (12/17/2005) Due \$ 55.00 Pay \$ **55.00** 

Adult	30.00
Season Ticket Pass	25.00
<b>Transaction Total:</b>	<b>55.00</b>

**Total Selected For Payment** **\$ 55.00**

Select Payment Method < Select Payment Method > 

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

**Refund Policy:** The refund policy is set by Northwestern Balloon Club. Refund requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.


[Cancel](#) 

Figure 4.3 – Pending Payments

This screen shows one or more payments pending, including the detail for each. Each payment is checked by default, but you can uncheck individual payments to change the total selected for payment.

## Credits

If you have any pending credits, they will be automatically applied, up to the amount of the pending payment. Any additional amount is available to be used for a future transaction.

## Discount Coupons

If you have a discount coupon, it can also be applied on the Payments page. If any published coupons apply to the transaction(s) on the page, you will see a field to enter the coupon code:

<b>Total Selected For Payment</b>	<b>\$ 50.00</b>
Have a coupon? Enter the code: <input type="text"/>	
	<input type="button" value="Apply"/>

Figure 4.4 – Enter the Coupon Code

Once the code has been entered, the screen changes as follows:

<b>Total Selected For Payment</b>	<b>\$ 50.00</b>
<i>Any event</i> <b>Coupon Applied</b>	<b>\$ 5.00</b>
<b>Net Payment</b>	<b>\$ 45.00</b>

Figure 4.5 – After a Coupon Code was Entered

Only one coupon can be applied per transaction and per payment.

## Partial Payments



Some event registrations allow a partial payment to be made. If you see a pencil icon beside the transaction amount, click it to modify the amount. You will see a recommended payment amount. The system will also enforce a minimum payment amount that is set for each event.



Type the partial payment amount and press *[Tab]* or click off the field. You can also click the undo icon to revert to the original amount owed.

## Payment Method

There are two payment options:

1. Pay online by credit card. With this option, you are presented with a credit card payment screen, including the option to store the card in the system. You must explicitly authorize ClubExpress to charge your card. Click the **Submit** button to process your transaction, after which a summary screen is presented.

Some clubs and associations use a merchant account built into the website. In this case, the charge will appear as ClubExpress on your credit card statement, together with our toll-free phone number if you don't recognize the charge. If other people (family members or the finance folks at your company) may see your statement, be sure to let them know to expect the charge.

Some clubs and associations have their own merchant account. In this case, the charge will appear as the club's or association's name on your credit card statement.

2. Print an invoice and mail a check. An invoice is displayed in a popup screen together with the Print dialog allowing you to print the invoice. When you are done, click the **Done** button on the main screen to exit the Renewal wizard.

If you choose to pay by check, or if you select credit card but the transaction does not complete, your payment is flagged as Pending and can be "revived" at any time. If you have pending payments, you will see a **Payments** link when you log in as well as on the Profile screen. Clicking it takes you to the above screen where you can print another invoice or choose to pay by a different credit card.

Note that your club or association may have chosen to disable credit cards or checks. If this is the case, one of these options will not be displayed and you will have to use the other payment option.

Note also that member types that require automated renewal payments do not include the option to store your credit card in the system. It will always be stored.

## Immediate Payment Required

If you are registering for an event where immediate payment is required, you will see a special warning dialog. You have 30 minutes to complete payment by credit card before the event registration is automatically canceled. The "Print Invoice and Send a Check" option is not shown.

## CONTACT INFORMATION

Click **Contact Information** to modify your name, address(s), phone number(s) work information, and email address. You will see a screen similar to the following:

Home • Member Profile • Contact Information

### Contact Information

This screen allows you to enter more contact information than was supplied in the Membership Application. Specify a Nickname to be used in correspondence. The Secondary Address can be used if you spend a significant part of the year living at another location. Use the Enable checkbox to activate this address in place of the Primary Address.

#### General Information

Member Number 3

Title

\*First Name

Middle Initial

\*Last Name

Nickname

Spouse First Name

Spouse Last Name

#### Primary Address

\* Address 1

Address 2

\* City

\* State/Province

\* Zip/Postal Code

\* Country

\* Home Phone

Figure 4.6 – Contact Information

ClubExpress provides two versions of this screen, one for clubs where members generally join as individuals and one for associations where members generally join through their work or business. Behind the scenes, each form collects the same basic information.

Required fields are indicated with a red dot. The Nickname, Spouse Name, Secondary Address and Work Information fields are optional and may not be visible if your club or association is choosing not to collect this information.


You may also see an option to receive a printed newsletter or to download the newsletter from the website, thereby saving the club some money.

Click **Save** or **Cancel** to close this screen and return to the Member Profile.

## ADDITIONAL MEMBER DATA

Every club or association collects member information that is unique to the organization. This information helps to create a more vibrant club that is in tune with its member's needs. In some cases, this information is required by government regulation, or by the organization's insurance carrier. Within ClubExpress, this is done using Additional Member Data.

Your club or association may have defined additional questions that you answered as part of your membership application or here in your profile. If this option is present, selecting it displays a screen similar to the one below:



The screenshot shows a web browser window with the title bar 'Home • Member Profile • Additional Member Data'. The page has a black header with the text 'Additional Member Data' in white. Below the header is a light gray box containing the text: 'This page lists the Additional Member Data that you provided when you joined the organization. It may also list additional questions that will help us to provide better services to you. Required questions are indicated by an asterisk.' Below this box are three questions with input fields: 'What is your ABA Number?' with a text box containing '921354', 'How many years have you been flying balloons?' with a text box containing '10', and 'What level of certification have you achieved? (not editable)' with a text box containing 'Assistant'. At the bottom of the form are two buttons: 'Save' with a checkmark icon and 'Cancel' with an 'X' icon.

Figure 4.7 – Additional Member Data

The answers to questions can take many forms, including Yes/No, a number or date, a selection from a list or a text response. Each question will have an answer “field” beside it which is appropriate for the question. Required questions are shown with a red dot.

Click **Save** or **Cancel** to return to the Member Profile screen.

## MEMBERSHIP DIRECTORY

Click **Membership Directory** to update the information shown in your membership directory entry, including a personal bio and photo. You can also choose what level of contact information to display. You will see the following screen:

Home • Member Profile • Membership Directory

### Membership Directory - Martin D Smith

This form allows you to store additional information to be shown in the Membership Directory. Use the Visibility drop-down list to decide what level of information should be displayed. You can also enter a brief personal biography and upload a photo.

Visibility: Show all information

Member Birthday: <Month> <Day> <Year> ☐ Reset

Spouse Birthday: <Month> <Day> <Year> ☐ Reset

Anniversary: <Month> <Day> <Year> ☐ Reset

#### Social Networking

LinkedIn:    
Enter your public profile name, under Account & Settings/Public Profile

Twitter:    
Enter your Twitter username

FaceBook:    
Copy and paste the id of your profile URL

MySpace:    
Enter your MySpace display name

Figure 4.8a – Membership Directory (top part)

### Visibility

The **Visibility** drop-down list allows you to control what information is shown to other members in the Membership Directory (this module is normally not visible to non-members.)

If members join the club through their personal lives, the following options are available:

- *Show all information.* Everything is visible.
- *Show all information except email.*
- *Show name, city, state, bio, email, phone and work info; no address.* Everything is visible except your home and alternate addresses.
- *Show name, city, state, bio, email and phone; no address or work info.* Everything except your addresses and work information is shown. (Some organizations may not collect work information.)

- *Show name, city, state, bio and email; no address, work info or phone.* In addition to the above, your phone numbers are also not shown.
- *Show name, city, state, and bio only; no contact information.* In addition to the above, your email address is also suppressed. But your bio and photo are still visible. If your club or association defined “Club Questions” to be shown on the Membership Directory, they will also be shown at this level.
- *Show name, city and state only; no bio or contact information.* With this option, your name, city and state are listed in the directory but no other information is provided. This is the default when your account is created.
- *Do not list me in the directory.* With this option, other members do not see you in the directory at all.

If members join the club through their business or professional lives, the following options are available:

- *Show all information.* Everything is visible.
- *Show all information except email.*
- *Show name, city, state, title, company, bio, email and phones, no address info.* Everything is visible except your address information.
- *Show name, city, state, title, company, bio and email, no phone or address info.* In addition to the above, your phone numbers are also not shown.
- *Show name, city, state, title, company and bio; no contact information.* In addition to the above, your email address is also suppressed. But your bio and photo are still visible. If your club or association defined “Club Questions” to be shown on the Membership Directory, they will also be shown at this level.
- *Show name, city, state, title and company only; no bio or contact information.* With this option, your bio and answers to Club Questions are also suppressed.
- *Show name, city and state only; no work, bio or contact information.* With this option, your name, city and state are listed in the directory but no other information is provided. This is the default when your account is created/
- *Do not list me in the directory.* With this option, other members do not see you in the directory at all.

## Birthdays and Anniversary

ClubExpress allows you to store your date of birth, your spouse/partner's date of birth and your wedding anniversary. Some clubs or associations may not prompt for this information. Even if it's enabled, it's entirely optional. Clubs also have the option of not showing the year for birthdays and anniversaries.

To remove a birthday or anniversary, check the **Reset** box and click the **Save** button at the bottom of the screen.

## Social Networking

If your club or association has enabled this option, you can create links to your public profile pages on the following popular social networks:

- FaceBook
- LinkedIn
- MySpace
- Twitter

The actual sequence is different for clubs and associations where members join through their personal lives or through their business/professional lives.

Enter your user ID for each service, which is usually the ID number at the end of the URL when you are viewing your public profile page. Do not enter any of the special characters between the domain name and your ID. For example, a typical Facebook URL looks like this:

*[http://www.facebook.com/home.php#/profile.php?id="12345"](http://www.facebook.com/home.php#/profile.php?id=)*

You only need to enter 12345 (without the quotes). We will handle the rest.

Click the **Test** button to test your link. A new window will be displayed, showing that social network and your profile page.

Note that you may also need to go into your Profile screen in each social network and make your page public to allow others to view it.

The Profile – Membership Directory screen continues below.



Figure 4.8b – Membership Directory (bottom part)

## Biography

The biography field allows you to enter personal or biographical information about yourself. This will help other club or association members get to know you better, including your background, interests and expertise. This information is entered using the advanced content editor built into ClubExpress. This editor provides full control over fonts, colors and formatting. It allows you to enter links and images and is virtually unlimited in length. For more information on using this content editor, see Chapter 19.

## Photo

You may upload a photo to be included in your Member Directory entry. We recommend that the photo be no more than 80 x 80 pixels. To upload a photo, click **Browse** and select the JPEG or GIF file from your hard disk. Then click **Upload Photo**. The photo will appear on the left side. To remove an existing photo, click **Delete Photo**. Click **Save** to save your changes and return to the Profile screen, or **Cancel** to return without saving.

You can also upload a hi-resolution photo. The system will display a special indication and will automatically generate a lower-resolution version to be shown on screen. Some clubs may use this option to generate a printed membership directory with photos; your organization will notify you if this option is required.

## CHAPTERS / ADDITIONAL MEMBERS



This option will appear if you picked a membership type that includes additional secondary and/or tertiary memberships *under* your account. It will also appear if your club or association allows you (or your secondary and/or tertiary members) to join chapters. You will see a screen similar to the following

### Chapters Only

If your club or association supports chapters but your membership does not support secondary and/or tertiary members, you will see a screen similar to the following:

Name / Chapter	Tools
J Bagwell San Francisco	<a href="#">Remove</a>

Done ✓

Figure 4.9 – Joining Chapter(s)

Some clubs allow members to join only one chapter while others allow members to sign up for multiple chapters. The **Add Chapter** link is used to add a chapter to your membership. You will see a screen similar to the following:

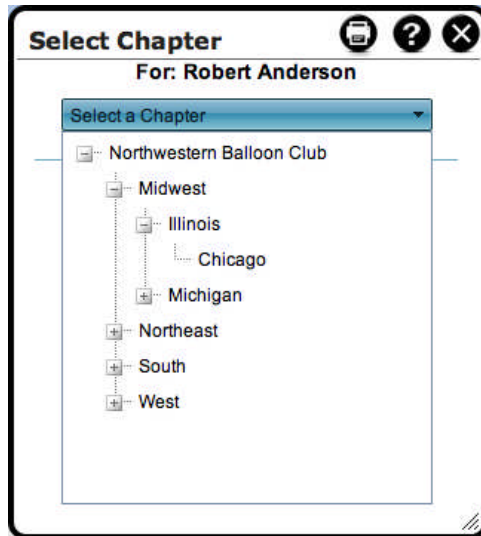


Figure 4.10 – Add Chapter

Click **Select a Chapter** and navigate the hierarchy to a chapter at the lowest level. Click **Save** to add this chapter to your membership or **Cancel** to close the dialog without saving.

### Secondary/Tertiary Members Only

If your membership type supports secondary and/or tertiary members but not chapters, you will see a screen similar to the following.

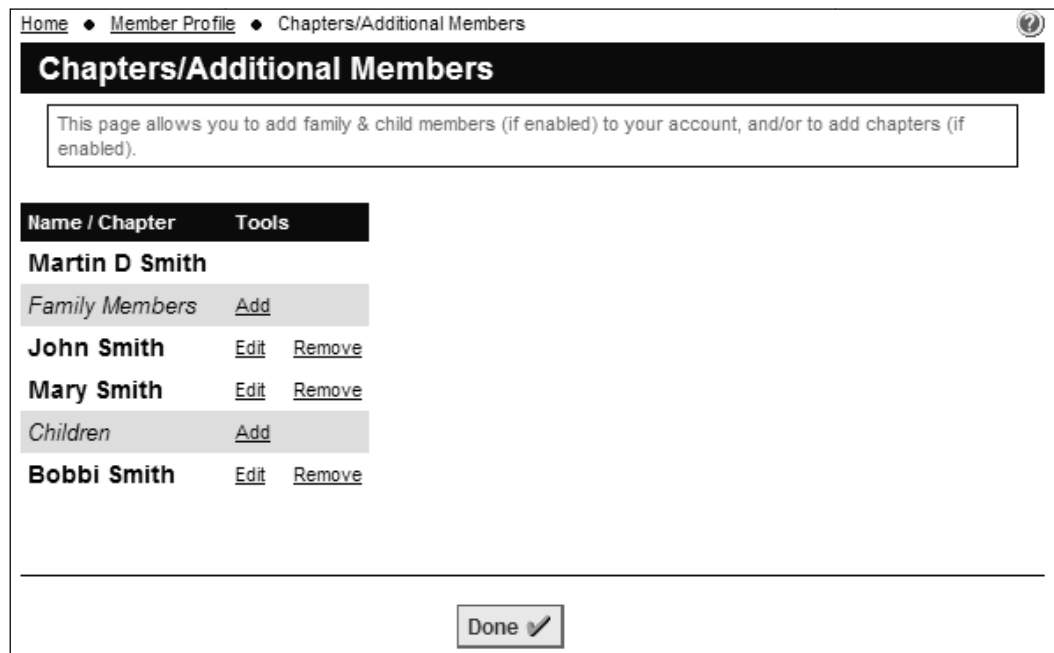


Figure 4.11 – Secondary and/or Tertiary Members

The first section below your name is for secondary members. It will use the keyword defined by your club or association for a secondary member who can

log into the website. The second section below your name is for tertiary members and it will also use the keyword defined by your club or association.

The **Add** link is used to add a secondary and/or tertiary member. If this link is not present, your membership does not support additional memberships of this type. Clicking the link displays one of two screens:

Your club or association may decide to only collect a minimum of information on secondary and/or tertiary members, including name, date-of-birth, gender and email address. This option is more suited to clubs where members join through their personal lives and where tertiary members may be children.

Figure 4.12 – Add Secondary and/or Tertiary Member – Simple Version

Alternatively, your club or association may decide to collect more complete information on secondary and/or tertiary members. This option is more suited to associations where members join through their business or professional lives.

**Edit Family Member**

Specify the name and contact information for this additional member attached to your account. Click "Save" to save your changes and return to the list of additional members, or "Cancel" to return without saving.

Relationship:

Salutation:  [Select](#)

First Name:  \*

Last Name:  \*

Address:   
 \*

[Click here to copy address and contact info from the primary member.](#)

City:  \*

State/Province:

Zip/Postal Code:  \*

Country:  [Show All Countries](#)

Email:

Phone:  \*

Cell Phone:

Company:

Title:

Figure 4.13 – Add Secondary and/or Tertiary Member – Full Version

Click **Save** to save this new member, or **Cancel** to close the dialog without saving. After a secondary member is added, the system will show you the username and password assigned to that member. When the secondary member logs in, he or she can change this information.

### Chapters and Secondary/Tertiary Members

If your club or association supports chapters AND your membership allows secondary and/or tertiary members, this screen may prompt for both types of information, as shown in the following example:

Home • Control Panel • Member Manager • Member Profile • Chapters/Additional Members

## Chapters/Additional Members for Eric Abrams

This page allows you to add family & child members (if enabled) to your account, and/or to add chapters (if enabled).

Name / Chapter	Tools
<b>Eric M Abrams</b>	
Chicago	<a href="#">Remove</a>
<b>Family Members</b>	<a href="#">Add</a>
<b>Callie Abrams</b>	<a href="#">Edit</a> <a href="#">Remove</a>
Chicago	<a href="#">Remove</a>
<b>Lisa Abrams</b>	<a href="#">Edit</a> <a href="#">Add Chapter</a> <a href="#">Remove</a>

[Done](#) ✓

Figure 4.14 – Add Chapter(s) and Secondary/Tertiary Members

First enter the secondary and/or tertiary members. Then for each member including yourself, you can add or remove chapters.

## ACHIEVEMENTS

If your club or association has enabled member achievements, select this option to view/update achievements for this member. For members themselves, this screen will be read-only; only an administrator or Member Manager coordinator can edit this data. You will see a screen similar to the following:

Home • Member Profile • Member Achievements

## Member Achievements

This screen shows the member's achievements. These will be listed on the Member's Use the links in the Maintain column to Edit or Delete an achievement. Press the Add Achievement button to add an achievement, and the Display Sequence button to change the order in which the Achievements are displayed here and on the Member's profile.

[Add Achievement](#) [Display Sequence](#)

Dates	Achievement	Maintain
2009-2010	President	<a href="#">Edit</a> <a href="#">Delete</a>
2008-2009	President Elect	<a href="#">Edit</a> <a href="#">Delete</a>
2007-2008	Club Treasurer	<a href="#">Edit</a> <a href="#">Delete</a>

[Return to Previous Page](#)

Figure 4.15 – Achievements


## TRANSACTION HISTORY

This option allows you to view the transactions you have made through your club's web site. When you select **Transaction History**, a screen similar to the following is displayed.

<a href="#">Home</a> • <a href="#">Control Panel</a> • <a href="#">Member Manager</a> • <a href="#">Member Profile</a> • <a href="#">Transaction History</a>			
Transaction History for Michael Droz			
This screen lists the on-line transactions done by this member, including membership dues and event registrations.			
✄ Date	Transaction Type	Amount	Status
✄ 10/12/2007	Event Registration	\$ 120.00	Not Paid
	Balance Due \$ 120.00		
	10/20/2007 - Buckeys Vs. Michigan State		
✄ 4/12/2007	Event Registration	\$ 50.00	Paid in Full
	5/27/2007 - Winter Wonderland		
✄ 3/23/2007	Sign Up	\$ 32.00	Paid in Full
	Transaction Total	\$ 202.00	
	Payment Total	\$ 82.00	
	Balance Due Total	\$ 120.00	
<a href="#">Return to Previous Page</a>			

Figure 4.16 – Transaction History


This screen shows all transactions done through the system with your club or association, in descending date order.

To view the details of one transaction, click the double down-arrow symbol  beside the date. You will see a display similar to the following:

⌵ 4/12/2007	Event Registration	<a href="#">Print</a>	\$ 50.00	Paid in Full
	5/27/2007 - Winter Wonderland			
Item(s):		Michael Droz - Meeting	\$ 10.00	
		Michael Droz - Dinner/Dance	\$ 40.00	
Payment(s):		4/12/2007 Credit card	\$ 50.00	
Note: the total payment was \$ 82.00 - the amount applied to this transaction was \$ 50.00				
<a href="#">Payment Receipt</a>				

Figure 4.17 – Transaction History showing expanded details

You will see the individual line item(s) making up the transaction, and the individual payment(s) used to complete this transaction. Click the blue *Print* link to display a printable receipt for this transaction in a separate window.

To close the detail display, click the double up-arrow symbol  beside the date. You can also click the double arrow symbol at the top of the list to open and close all items at once.

### Administrator Options

Administrators will see a Cancel link beside membership and miscellaneous transactions. (For now, event registrations and donations are handled from their respective modules.)

- Transactions that were paid through ClubExpress (credit cards and checks sent to us) can only be cancelled, not deleted. A credit will be added to the member's account.
- Transactions that were paid directly to the club (check, cash, etc.) or that were comp'ed or written off can be canceled or deleted.
- Unpaid transactions can only be deleted.

These new options are especially useful for cleaning up the transactions and payments that you did in Trial mode, to leave the transaction and payment histories as "clean" as possible. Note that deleted transactions cannot be recovered; they are gone. And cancelled transactions cannot be "un-cancelled".

When you have finished, click **Return to Previous Page** to return to the Member Profile menu.

## **PAYMENT/CREDIT HISTORY**

This option allows you to view the payments you have made through your club's web site. When you select **Payment/Credit History**, a screen similar to the following is displayed.

Home • [Control Panel](#) • [Member Manager](#) • [Member Profile](#) • [Payment/Credit History](#)

## Payment/Credit History for Sara A Ballard

This screen lists the payments made by this member, including membership dues and event registrations.

### Payments

Date	Payment Type	Amount	Receipt	Maintain
12/17/2007	Cash (to club)	\$ 30.00	<a href="#">Receipt</a>	<a href="#">Edit</a> <a href="#">Delete</a>
11/28/2007	Cash (to club)	\$ 21.36	<a href="#">Receipt</a>	<a href="#">Edit</a> <a href="#">Delete</a>
Payments Total		\$ 51.36		

### Credits

Date	Credit For	Status	Amount	Balance
3/31/2008	Volunteering at new-member orientation	Available	\$ 20.00	\$ 20.00
Credits Total			\$ 20.00	\$ 20.00

[Return to Previous Page](#)

Figure 4.18 – Payment History

In the upper panel, you will see the date, type and amount of each payment made to the club, whether through the system, by mail, or at an event. Click the [Receipt](#) link to display a popup receipt for the payment.

In the lower panel, you will see the date, reason, status and amount of each credit applied by the club to your account.

## CREDIT CARD

Click **Credit Card** to maintain the credit card you use to renew your membership and register for events. You will see the following screen:

Figure 4.19 – Credit Card Information

ClubExpress allows you to store a credit card in the system, so that you don't need to re-enter it each time it's needed. This is optional; if you don't store it, you can still pay with a credit card by entering the details when prompted. If you choose to store your credit card, you can be reassured that it is maintained in an encrypted database that cannot be read except by the software and then, only under program control. All credit card transactions are conducted in secure sessions, to provide an additional level of protection.

If there is no credit card stored, the top section including the **Remove** button is not shown. Instead, you can enter the credit card information and click **Save** to save your information, or **Cancel** to return to the Profile screen without saving.

If the address for the credit card is different from the Primary Address stored in your account, click **Yes** for the question at the bottom of the page; a new panel will be displayed, allowing you to enter the address information.

If a credit card is already stored, click the **Remove** button to remove it. There is no confirmation of this step.

Important note: when you pay a pending transaction by credit card, the charge on your monthly statement will read "*ClubExpress*" unless your club or association has established its own merchant account.

## Automated Payments

ClubExpress includes an option to allow memberships to be renewed and paid automatically. When this option is enabled by a club or association, and when you select a member type which is configured for automatic renewal and payment, you will not receive a renewal notice and you do not need to login to renew; the system will renew you based on the duration of the chosen member type (every month, every quarter, every year, etc.) and will charge your saved credit card automatically.

If you select a member type that is configured for automatic renewal and payment, you will see a special note on the summary page, before you save your membership and proceed to the payment page.

When this option is enabled, the system requires that your credit card be saved and you will not have the ability to remove it. You will still see this screen so that you can change the card or update it (for example, to modify the expiration date or validation code when a new card is issued.) However, the **Remove** option will not be shown.

To stop the automatic charging you must cancel your membership, effectively resigning from the club. To do so, click the **Cancel My Membership** button on your Member Profile screen.

When clubs and associations use this option, we require them to have their own merchant account. So transactions will appear on your monthly statement using the name of your club or association.

## EVENT HISTORY

Select this option to view a history of all events you have attended. You will see a screen similar to the following:

Home • [Member Profile](#) • [Event History](#)

## Event History

This screen lists the events that you have registered for. If you registered companions they will appear here as well.

Event	Date	Amount	Status	Attendance
Board Meeting	11/18/2008	0.00	Paid	Not Recorded
Fall Balloon Rally	11/13/2008	5.00	Canceled	Not Recorded
Fall Balloon Rally	11/13/2008	5.00	Paid	Not Recorded
Mardi Gras	8/21/2008	1.00	Paid	Not Recorded
Monthly Luncheon	9/4/2008	<a href="#">Print</a>	Paid	Not Recorded

When: Thursday, Sep 4, 2008, 11:30 AM until 1:30 PM  
Where: Manny's Restaurant  
5005 Newport Drive, cnr Algonquin Road.  
Rolling Meadows, IL

Registered On 8/5/2008  
Companions  
Mark Smith

Pizza Party	7/31/2008	10.00	Paid	Not Recorded
-------------	-----------	-------	------	--------------

Figure 4.20 – Event History

Click the double-down arrow symbol ▼ to display details of that event. You can also click this symbol in the header to display details for all events. Click the blue [Print](#) link to print the details for each event.

## Cancellations

If the event was configured to allow cancellations, and if the cancel deadline has not passed, you will see a [Cancel](#) link to the right of the attendance column. Clicking it allows you to cancel your registration for this event.

If the event was free, or if the fee had not yet been paid, clicking the [Cancel](#) option simply marks your registration as “Canceled”. If you had paid a fee to attend the event, a credit is also issued to your account for the amount paid, minus any cancellation penalty that the club or association may have imposed. This credit can be used against any future charges.

ClubExpress does not issue refunds, although your club or association may choose to convert the open credit into a refund.

## OPTIONAL ADDITIONAL CHARGES

Select this option to process additional charges at any time during the year (instead of just at sign-up and renewal times.) You will see a screen similar to the following:

Home • Member Profile • Additional Charges

### Additional Charges

This screen allows you to purchase additional charges and membership options. Some charges may allow you to change the default fee or quantity.

Additional Charge Item	Quantity	Price	Total Price
<input type="checkbox"/> Club Sweatshirt Cotton fleece blue sweat; L only.	N/A	30.00	
<input checked="" type="checkbox"/> Student Supplies Packet Includes writing paper, pencils, color pencils, erasers, ruler, sketch pad, shape template, pencil case, etc.	N/A	50.00	50.00
Total Additional Charges			\$ 50.00

Figure 4.21 – Optional Additional Charges

Select one or more charges. Some charges may give you the option of adjusting price (for example, for a donation) or quantity. The Total at the bottom will update automatically. Click the **Proceed to Payment** button to complete your selection and jump to the payment page. Complete payment as normal.

## FORUM GENERAL PREFERENCES

If your club or association has enabled the discussion forums function, this choice is also shown on the menu. It allows you to control your interactions with discussion forums, including general viewing preferences, message authoring preferences, and screen name. When you click the **Forums** choice, you will see the following screen:

Home • Member Profile • Forum General Preferences

### Forum General Preferences

Select your preferences which apply to all discussion forums. Some of these settings can also be set individually on each forum.

---

#### Viewing Messages and Threads

Threads Per Page

Preferred Thread Sort

Preferred Message View ☐ Threaded ☒ Flat

Msgs Per Page (Threaded)

Msgs Per Page (Flat)

Preferred Message Sort

Note that the message sort setting applies to the flat message view only

---

#### Email Address

Use Email Address ☒ Primary Contact Email (info@clubexpress.com)  
☐ This Address

Allow Private Replies ☐ Allow forum members to send replies directly to me via email

☐ Check this box to apply the email address choice to all my forums

---

#### Message Delivery

Send Email ☒ Send Forum Messages To Me Via Email  
NOTE: When this option is checked, you can control the sending of email for each forum individually from the "Forum Memberships" page. When un-checked, you will not receive emails from any of your forums, regardless of the individual settings.

Email Links ☐ Remove additional links and info text from my forum emails  
NOTE: Forum emails include some identifying text and useful links after the message(s). Check this box if you wish to remove this text.

Email Format ☒ Plain text in the body of the email  
☐ Rich formatting in the body of the email

Frequency

☐ Check this box to apply these message delivery options to all my forums

Figure 4.22a – Forum General Preferences (top part)

The following options are available:

## Viewing Messages and Threads

- **Threads Per Page** controls how many threads are shown in the initial list of threads when a forum is first opened. You can specify any number, but we recommend not going higher than about 100.
- **Preferred Thread Sort** controls how threads are sorted in this initial view. The options are by date, author and subject, either ascending or descending.
- When you click on a thread, **Preferred Message View** determines which detail view will initially be displayed. Threaded View shows the current message at the top, with the rest of the thread underneath, one line per message, with the indent level indicating the hierarchy of replies. Flat View expands all messages in the thread, without showing a hierarchy.
- **Messages Per Page (Threaded)** controls the number of messages shown on a single page in Threaded View. This number should normally be higher than messages per page in Flat View, since only the current message is fully expanded. You can specify any number but we recommend not going higher than about 100. Additional messages are viewed by navigating through pages.
- **Messages Per Page (Flat)** controls the number of messages shown on a single page in Flat View. This number should normally be lower than messages per page in Threaded View, since all messages are fully shown. You can specify any number but we recommend not going higher than 20. Additional messages are viewed by navigating through pages.
- **Preferred Message Sort** applies to Flat View only. It controls the initial sort order when a thread is displayed. The options are by date, author and subject, either ascending or descending.

## Email Address

- **Use Email Address** is the email address that will be used for forums configured as email lists (“listserve” option). By default, this is your primary email address but you can change it to any address.
- The **Allow Private Replies** checkbox controls whether other forum members can send replies to you directly via email.
- The check box allows you to propagate this address into every forum that you’re subscribed to that requires an email address.

## Message Delivery

- **Send Email** controls whether you want forums that normally send emails to actually do so. If this option is not checked on the General Preferences page, you will not receive emails from any of your forums, regardless of the individual settings.
- **Email Links** allows you to remove the standard text that normally appears at the bottom of each email. This text tells you how view the email online, modify preferences, opt-out, etc.
- **Email Format** controls the format of such emails, either plain text or full HTML. If Send Email is unchecked, this section will be unavailable.
- **Frequency** controls how forums configured as email lists send messages to you. The options are:
  - Immediately – send messages individually and immediately;
  - Daily - Digest – send one message a day containing all messages;
  - Daily - Subjects – send one message a day containing subjects only; each message includes a link to view the complete email online.
- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

The description of Forum General Preferences screen continues below:


Authoring Messages	
Preferred Text Editor	<input type="radio"/> Simple - Text Only <input checked="" type="radio"/> Advanced - With Formatting Tools
Message Signature	<input type="checkbox"/> Attach the following signature to each message <div style="border: 1px solid #ccc; height: 60px; margin: 5px 0;"></div> <small>200 characters max. Do not enter html text. Note that the signature is used only for messages created online, not posted via email.</small>
<input type="checkbox"/> Check this box to apply the signature settings to all my forums	
Identification	
Forum Handle	<input type="text" value="msmith"/>
Show Name	<input checked="" type="checkbox"/> Display my full name with my messages
Link to Bio	<input checked="" type="checkbox"/> Display a link to my directory listing (bio) with my messages
Show Location	<input checked="" type="checkbox"/> Display my location with my messages Location: <input type="text" value="Chicago, IL"/>
Local Time Offset	The current server date & time is 7/10/2009 2:39 PM. Specify your offset time in hours (+/-). <input type="text" value="0"/>
Show Picture	<input checked="" type="checkbox"/> Display this picture with my messages <div style="text-align: center;">  </div>
Select Picture	<input type="text"/> <input type="button" value="Browse..."/>
<input type="checkbox"/> Check this box to apply these identification options to all my forums	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 4.22b – Forum General Preferences (bottom part)

## Authoring Messages

- The default **Text Editor** is a simple, text only input field that is suitable for the majority of users. However, more experienced users can switch to an advanced editor which includes support for text formatting, fonts, colors, tables and other options. (This is the same editor used to create custom pages within ClubExpress; it is explained in Chapter 17.)
- If you want to attach a standard **Message Signature** to each message, check the box and specify the sig. in the field provided. This saves you from typing a standard set of characters at the end of each message. Forum users often include their name, location or a catchy phrase in a signature, although forum etiquette suggests that signatures should not be excessively long.

- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

### Identification

- **Forum Handle** allows you to specify a name to use within forums. This does not need to be your login name, although this is the default choice. If you are known within your club for a particular area of expertise or interest, you might select a name which reflects that reputation.
- The **Show Name** checkbox controls whether your name is attached to messages in addition to your handle. If you wish to remain anonymous, uncheck this option. You can also specify a "different" name from the one under which your club membership is defined.
- The **Link to Bio** checkbox controls whether other users will see a link on your forum handle that jumps to your bio screen in the Membership Directory module.
- The **Show Location** checkbox controls whether your location is attached to messages. If you wish to keep this information confidential, uncheck this option. You can also specify a different city and state from the ones under which your club membership is defined.
- With the **Local Time** option correctly set, you will see when other messages were posted relative to your own location. (Our servers are located in the Central Time Zone, so messages are normally tagged with their date/time of posting based on this time.) For example, if you are located on the west coast, specify "-2" for this option. Then, when you are viewing a message posted on our servers at 10:45 AM CST, it will show 8:45 AM as your local time when the message was posted.
- If you want to display a small picture beside each message, check the **Show Picture** checkbox then specify a local file to upload. We recommend that this picture be no more than 80 x 80 pixels in size; you can use the same or a different picture from the one you uploaded with your directory entry.
- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

When you have finished configuring these options, click **Save** to save your changes and return to the Profile menu. If you want to return without saving changes, click **Cancel**.

## FORUM MEMBERSHIPS

This option allows you to manage your subscriptions and preferences in forums that are available to all members or to members of an interest group or committee of which you may also be a member. Selecting this option displays a screen similar to the following:

Home • [Member Profile](#) • [Member Forums](#)

### Member Forums

This screen lists the forums that you are currently a member of. Click the Pause button to temporarily prevent receiving any forum emails. Click the Resume button when you want to start receiving forum emails again. Click the edit link if you would like to change your personal settings for a specific forum.

Status: You are currently receiving emails, based on your forum settings. [Pause](#)

Forum	Message Delivery	Email	Maintain
Board of Directors	Forum Does Not Send Emails	info@gembrook.com	<a href="#">Edit</a>
Buy / Sell / Trade	Do not send emails	dan@clubexpress.com	<a href="#">Edit</a> <a href="#">Remove</a>
Day Trips	Forum Does Not Send Emails	msmith@balloons.com	<a href="#">Edit</a>
Equipment	Forum Does Not Send Emails	msmith@balloons.com	<a href="#">Edit</a>
Official Club Business	Forum Does Not Send Emails	msmith@balloons.com	<a href="#">Edit</a>
Safety	Send Immediate Emails	msmith@balloons.com	<a href="#">Edit</a>

[Return to Previous Page](#)

Figure 4.23 – Forum Memberships

The **Status** panel allows you to temporarily unsubscribe and then re-subscribe to forums without losing your configuration settings. Click the **Pause** option when you are going on vacation or otherwise want to suspend receiving emails for a period of time. Click the **Resume** button to restore email delivery.

The main grid shows forums that allow you to participate in forum discussions. (This may not be the complete set of forums defined by the club.) Two types of forums are shown in the list:

1. If a forum is available for all members to opt-in, you can subscribe and unsubscribe from this forum. Click the **Join** link in the Maintain column to subscribe to the forum, or the **Remove** link to unsubscribe.
2. If the forum membership is “all members”, or is based on a committee, an interest group, or a member type, or is moderator-defined, you are a member of the forum through an external setting. You cannot unsubscribe from such a forum but you can suspend email delivery for such a forum so that you are effectively not participating.

Click the **Edit** link to modify settings for an individual forum. You will see a screen similar to the following:

Home • Member Profile • Member Forums • Forum Preferences

## Forum Preferences for Engine maintenance

Select the message delivery and message authoring options you prefer to use in conjunction with this forum. Click 'Reset to Default' to use your forum general preferences. Click 'Save' when finished.

---

### Email Address

Use Email Address ☐ Primary Contact Email (info@clubexpress.com)  
☒ Forum Default Email (info@gembrook.com)  
☐ This Address

Allow Private Replies ☒ Allow forum members to send replies directly to me via email

---

### Message Delivery

Send Email ☒ Send Forum Messages To Me Via Email

Email Format ☒ Plain text in the body of the email  
☐ Rich formatting in the body of the email

Frequency

---

### Authoring Messages

Forum Handle

Message Signature ☐ Attach the following signature to each message

200 characters max. Do not enter html text. Note that the signature is used only for messages created online, not posted via email.

---

### Identification

Show Name ☒ Display my name with my messages

Link to Bio ☒ Display a link to my directory listing (bio) with my messages

Show Location ☒ Display my location with my messages

Show Picture ☒ Display my picture with my messages

---

Figure 4.24 – My Preferences for a Forum

Many options on this screen match choices on the general preferences screen, so they won't be repeated here. Some choices may or may not be displayed, depending on whether that forum supports email posting and/or delivery.

**Use Email Address** allows you to control the email to which forum messages are sent on a forum-by-forum basis. You can use your primary email, the forum's general default, or a completely different email address just for this forum.

Click **Save** to save your changes and return to the Profile menu. If you want to return without saving changes, click **Cancel**.

## THREAD SUBSCRIPTIONS

Click **Thread Subscriptions** to view forum threads to which you are currently subscribed. You will see a screen similar to the following:



The screenshot shows a web interface for managing thread subscriptions. At the top, there is a breadcrumb trail: Home • Member Profile • Thread Subscriptions. Below this is a header bar with the title "Thread Subscriptions". A message box states: "This screen lists your current thread subscriptions. Check one or more threads, and click 'Unsubscribe' to remove subscriptions." The main content area lists three threads, each with a checkbox and the forum name "Forum: Equipment":

- ☐ **New Burner - Anyone Tried?** Forum: Equipment
- ☐ **Sticky Release Value** Forum: Equipment
- ☐ **Used basket and frame** Forum: Equipment

Below the list are two links: [Check All](#) and [Un-check All](#). A button labeled "Unsubscribe" is positioned below these links. At the bottom of the page, there is a button labeled "Return to Previous Page".

Figure 4.25 – Thread Subscriptions

Check the threads from which you want to unsubscribe, then click the **Unsubscribe** button. You can also click the [Check All](#) and [Un-check All](#) links. Click **Return to Previous Page** when you are done.

## USER NAME / PASSWORD

Click **User Name / Password** to update your login information. You will see the following screen:

Home • Member Profile • User Name and Password

### User Name and Password

Some areas of our web site are only available to members. Your username and password allow you to log into the site to access these features. The name you choose must be unique within the club.

User Name  6 of 50 characters used

Password  5 of 50 characters used Weak

Re-enter Password

☒ Remember me on this computer

#### Password Info

A password strength indicator will give you a score on your selected password as you type. Note that this is for your information only - this web site does not enforce specific password rules.

Some tips for a strong password:

- Do not use common, obvious passwords like 'password' or '123'
- Do not use easily guessed passwords like your first name or your birthday
- Include a mix of upper- and lower-case letters and numbers
- Add punctuation and other special characters
- Longer is better
- A 'passphrase' is often better than a complex password. For example, 'My favorite color is ecru' is a very strong password; it is easy to remember and hard to guess

Save Cancel

Figure 4.26 – User Name and Password

Because your password is encrypted by the system using a one-way hashing algorithm (so that no-one, not even a ClubExpress support agent, can read it), there is no way to retrieve the current password. If you press **Cancel** to close this screen without making a change, your original password is retained. But if you want to change your user name, your password must be re-entered (twice!), even if it does not change.

Your User Name is made up of letters and numbers, and must be unique within your club. It is not case-sensitive. It can be up to 50 characters long.

Passwords can be up to 50 characters long and may include anything, even punctuation symbols. The password is case-sensitive. The system will display a dynamic “password strength” meter as you type. Stronger passwords include a mix of upper and lower case letters, numbers, punctuation, even spaces.

Check the **Remember me on this computer** option so that you don't have to enter your user name and password each time. When you click Member Login, you will be logged in automatically. Uncheck this option to require a user name and password each time you log in. You should not use this option if more than one person uses this computer to login to this website (for example, if you are using a computer at a public library), or if two family members share a computer, otherwise the other person will not be able to login under his or her account.

Click **Save** or **Cancel** to close this screen and return to the Member Profile.

## INTERESTS

If your organization has enabled the Interests module, this choice will be shown on the menu. It allows you to register your affiliation or expertise in various club or association programs or topics of interest to members. When you click the **Interests** choice, you will see a screen similar to the following:

The screenshot shows a web interface for the 'Interests' module. At the top, there is a breadcrumb trail: 'Home • Member Profile • Interests'. Below this is a black header bar with the word 'Interests' in white. Under the header is a text box with the placeholder 'Select the interests in which you would like to participate.' The main content area is divided into two sections: 'Maintenance' and 'Competition'. The 'Maintenance' section has a sub-header 'Maintaining and preparing balloons and associated equipment for the flying season' and a list of four items, each with a checked checkbox: 'Burners' (Maintaining the gas burners, including storage tanks, pipes, jets, controls, gauges and other equipment), 'Envelope' (Maintaining and repairing the balloon envelope, including vents, lines and control surfaces), 'Baskets' (Maintaining baskets, including lines, safety harnesses, weights and other passenger elements), and 'Support Equipment' (Everything but the basket, burner or envelope). The 'Competition' section has a sub-header 'Sweep Rowing' and one item with a checked checkbox: 'Balloon races' (We're interested in every aspect of balloon racing. We love to race and improve our skill at reading the weather, winds and terrain. We also foster competition with other clubs).

Figure 4.27 – Interests

Interests are organized into categories. Each interest has a checkbox and your current interests will be checked. In general, you can check or uncheck as many interests as you wish but clubs also have the option to limit how many interests can be checked within each category. To clear the slate and start over, click the **Uncheck All** link at the end of the list.

When you have finished, click **Save** or **Cancel** to return to the Member Profile screen.

## PHOTO ALBUMS

If your club or association has enabled member-level photo albums, the **Photo Albums** choice will be visible. This option allows you to create website albums and upload hi-res digital photos into them. A club administrator can also place these photos on club-level photo albums.

When you select this option, you will see a screen similar to the following:

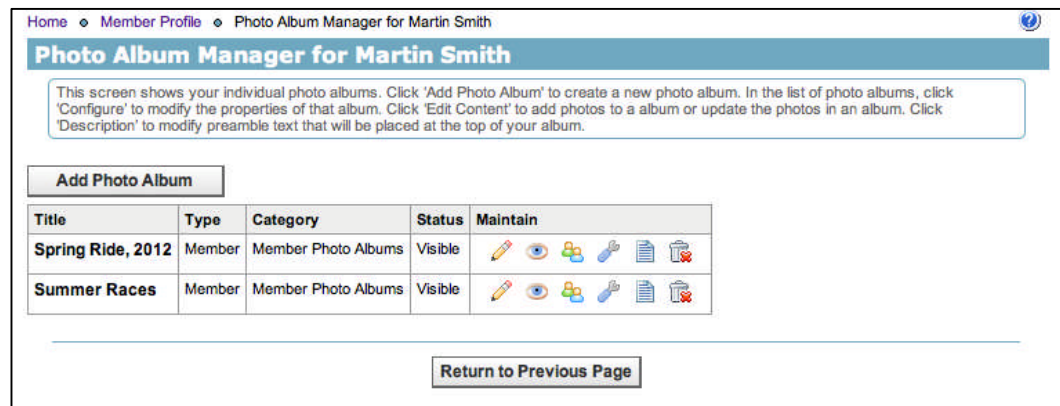


Figure 4.28 – Member Photo Albums

The grid shows photo albums that you have created, perhaps built around a specific event or project. The grid shows the title and status for each photo album. The following options are available:

### Add Photo Album

Click the **Add Photo Album** button to create a new photo album. You will see the following popup dialog:

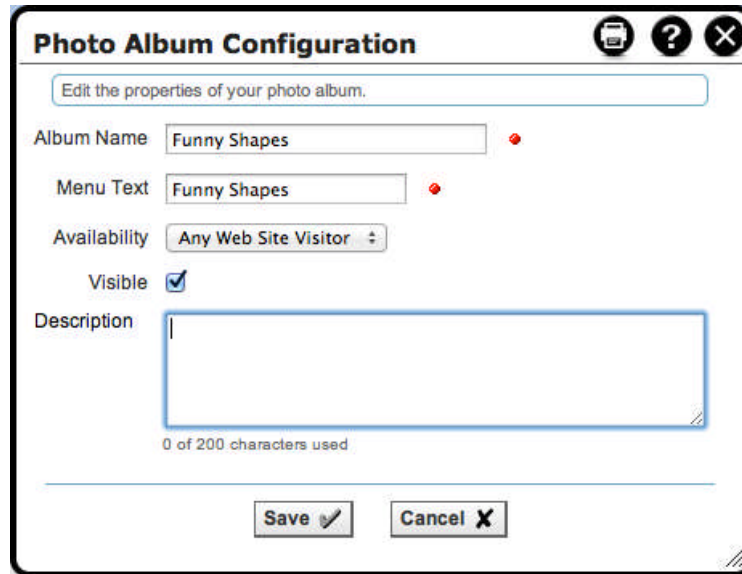
The image shows a 'Photo Album Configuration' dialog box. At the top, there's a title bar with a print icon, a help icon (question mark), and a close icon (X). Below the title bar is a subtitle 'Edit the properties of your photo album.' followed by a text input field. The main form contains several fields: 'Album Name' with the value 'Funny Shapes' and a red error icon to its right; 'Menu Text' with the value 'Funny Shapes' and a red error icon to its right; 'Availability' with a dropdown menu showing 'Any Web Site Visitor'; 'Visible' with a checked checkbox; and 'Description' with a large text area. Below the description area, it says '0 of 200 characters used'. At the bottom, there are 'Save' and 'Cancel' buttons. The 'Save' button has a checkmark icon, and the 'Cancel' button has an X icon.

Figure 4.29 – Add/Edit Photo Album

Specify the album name and text that can be used if the album is placed on the menu (which is often shorter.) You can also specify whether the album will be available to all website visitors or whether it should only be visible to members.

The album is initially hidden, to allow you to add photos and introductory text to it; when you are ready, click back to this screen using the **Configure** link to make the album visible.

You can also enter a short description.

Click **Save** or **Cancel** to return to the Photo Album Manager screen.

## Maintaining Your Photo Albums

If you are not clear about the meaning of any icon, click **Legend** to display a drop-down list.

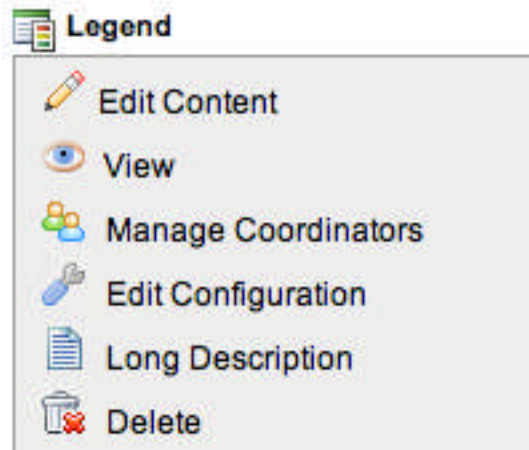








Figure 4.30 – Legend for managing Photo Albums

-  Click the **Edit Content** icon to manage the photos placed on the album, as well as a detailed description of the album. This option is described in more detail below.
-  Click the **View** icon to display the photo album, even if it's not on the menu.
-  Click the **Manage Coordinators** icon to add one or more coordinators who have administrative rights over this album. You will see the same screen described above for built-in functions.
-  Click the **Edit Configuration** icon to display the dialog described above, allowing you to change name, menu text, category and visibility.
-  Click the **Long Description** icon to display the advanced content editor, allowing you to create a more detailed description of the album. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.
-  Click the **Delete** icon to drop the album. You will be asked to confirm this action, which cannot be reversed; the album is completely deleted. Note however that any photos placed on the album are not deleted; they are still stored in your website and can be placed on other albums or pages.

## EDITING PHOTO ALBUM CONTENT



When you click **Edit** you will see a screen similar to the following:

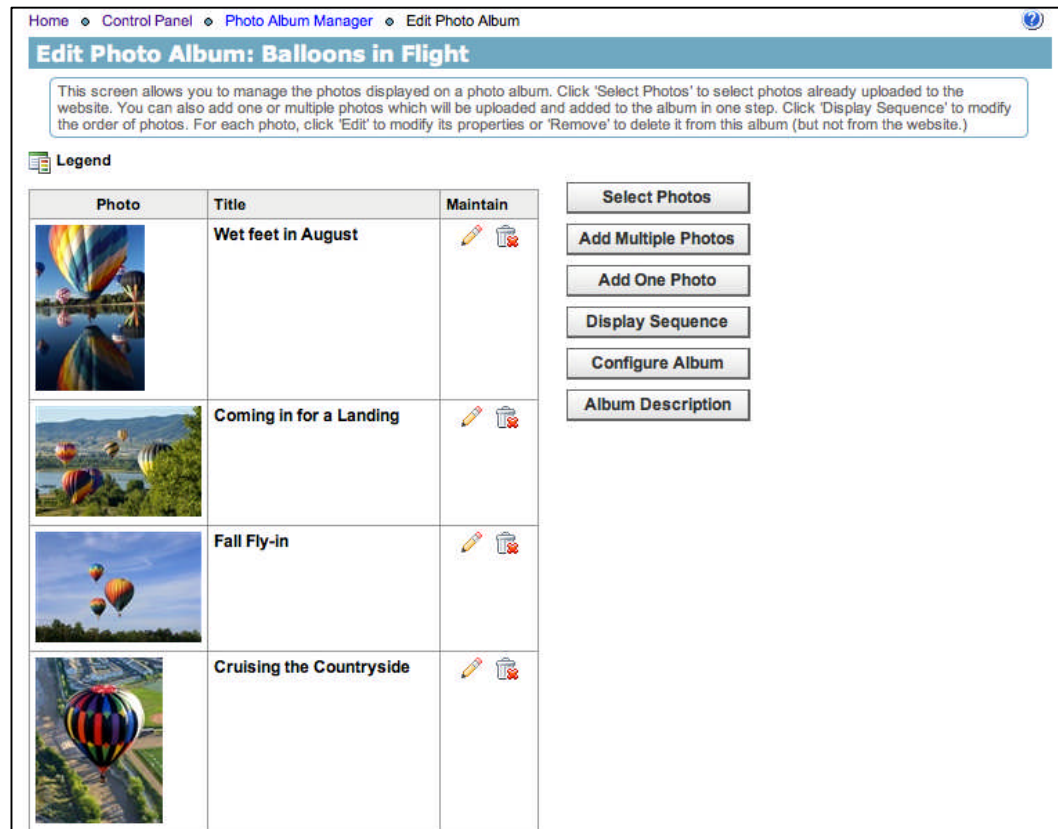


Figure 4.31 – Edit Photo Album Content

This screen shows the photos uploaded to the album. For each photo, the following options are available:



Click the pencil (Edit) icon to display a popup dialog showing the information saved with the photo. You can modify all the information saved with the photo. Click **Save** or **Cancel** to return to the Edit Photo Album screen.



Click the Remove link to remove the photo from this album. It remains in the photo manager to be used on other photo albums. You will be prompted to confirm this action.

The following buttons are available:

### Select Photos

Click this button to add photos to the album that have already been uploaded. You will see a dialog similar to the following:

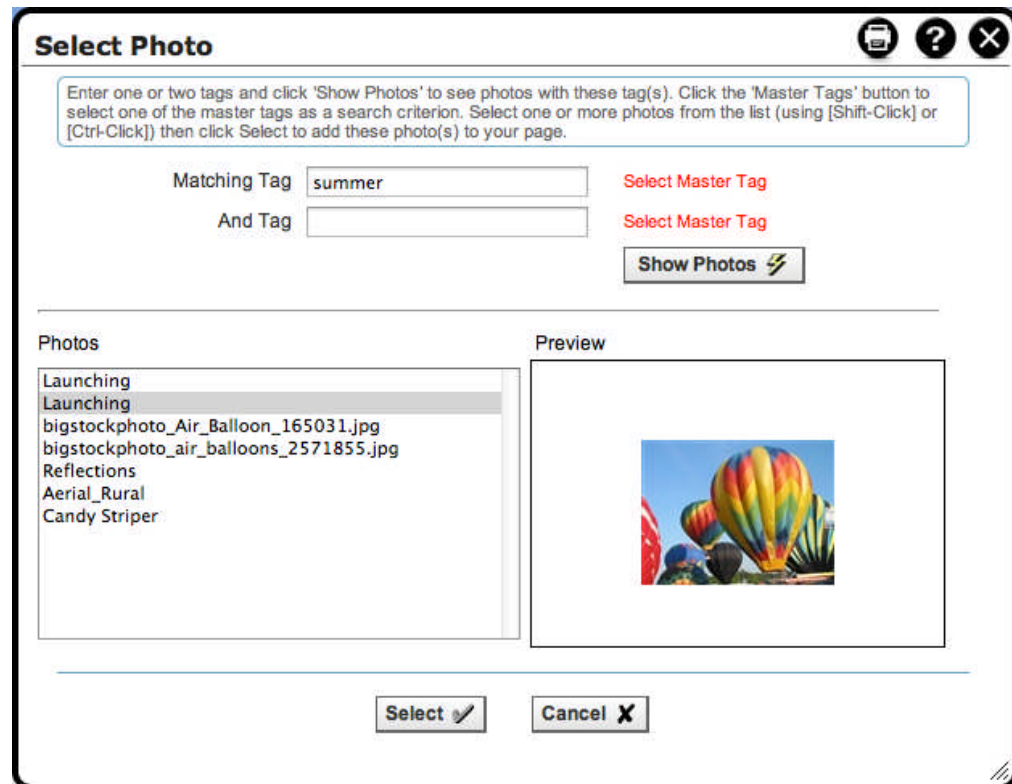


Figure 4.32 – Select Photos

Enter one or two tags and click the **Show Photos** button to display a list of photos with these tags. You can also select tags from the master tag list. As you click on a photo, a preview is shown in the right panel. You can also *[Shift-Click]* and *[Ctrl-Click]* to select multiple photos at a time, but the preview panel will only show the first selected photo in the list.

Click the **Select** button to add the selected photo(s) to the album, or **Cancel** to close the dialog without adding photos.

### Add Multiple Photos

Select this option to upload multiple photos and place them all on your album. You will see the following dialog:

**Add Multiple Photos**

Use this screen to upload multiple photos. Click the 'Select Files' button to select one or more files from a local hard disk directory or network. Use [Shift-Click] to select a contiguous group of files or [Ctrl-Click] to select multiple individual files. Then fill out the other information below and click Save to begin the upload process.

Select Files

FileName	Title	Status
bigstockphoto__Aug__Day_Trip__232829.jpg	Reflections	<a href="#">Remove</a>
bigstockphoto_Aerial_Rural_Hot_Air_Balloonin_641929.jpg	Aerial_Rural	<a href="#">Remove</a>
bigstockphoto_Air_Balloon_165031.jpg	Candy Striper	<a href="#">Remove</a>

Photographer: Martin Smith

Date Taken: 4/13/2013

☒ Allow Download of Hi-Res Versions

Select Master Tag(s)

Tags: summer, red, stripes

Enter one or more tags that will be used to categorize these photos, one per line. Click the "Select Master Tag(s)" link to select tags from the master list.

Save Cancel

Figure 4.33 – Add Multiple Photos

Click the **Select Files** button to display a standard File Open dialog. Navigate to the folder containing the photos you want to upload. Click the first photo then use *[Shift-Click]* to select a contiguous set of photos or *[Ctrl-Click]* to select discontinuous photos. You can only upload photos from one folder at a time.

When you click the **Open** button you will see a list of selected photos, sorted by their original filename. If you see photos in the list that you don't want to upload, click the **Remove** link to remove them from the list.

You can specify a title, caption, photographer, date taken, and tags that will be applied to all photos. Once they have been uploaded, you might want to edit each photo to individualize the titles and captions.

When you click **Save**, all of the photos will be uploaded to the website and placed on your album. Click **Cancel** to close the dialog without uploading.

**Important Note: Only upload photos that you have the right to upload (i.e. you hold the copyright or the copyright holder has granted permission for the photo to be uploaded.) If you upload photos without permission of the copyright holder, you run the risk of being sued for unauthorized use of copyrighted material.**

### Add One Photo

Select this option to upload a single photo and place it on the album. You will see the following dialog:

**Add/Edit Photo**

This screen allows you to upload a single photo to the website. Select the file from your local hard disk or network, then complete the fields below. Tags allow admins and other users to find this photo. *Fields marked with a red diamond require an entry.*

Select File  bigstockp...1149.jpg

Title

Caption

0 of 500 characters used

Photographer

Date Taken

☒ Allow Download of Hi-Res Version

Select Master Tag(s)

Tags   
race  
sailing

Enter one or more tags that will be used to categorize this photo, one per line. Click the "Select Master Tag(s)" link to select tags from the master list.

Figure 4.34 – Add Photo

Click the **Browse** button to browse to a photo on your local hard disk. You can also specify a title, caption, photographer, date taken, and one or more descriptive tags.

Tags are used to index and reference photos. Enter tags into the text box, one per line. Your club has also created “master” tags that may be appropriate for

your photo. Click **Select Master Tags** to add one or more of these tags to your photo.

Click **Save** to upload your photo and add it to the page or **Cancel** to close the dialog without saving.

When the photo is uploaded, the system checks its size. Large photos are saved in three resolutions:

- Original resolution, uncompressed
- Screen size (longest dimension is 450 pixels)
- Thumbnail size (longest dimension is 120 pixels)

Photos that are smaller than the screen size are only saved in two resolutions.

Check the **Allow Hi-Res Download** box to allow members to download an original high-resolution copy of the image. A special button is displayed in the popup photo viewer. Note that this button is never shown to the public, only to members and then only if the box is checked. Note also that users can still right click the lo-res screen size version and save it; there is no way to stop this.

### Display Sequence

This button shows the standard ClubExpress sequence dialog, allowing you to reorder the photos on the album. Note the first photo in the list is used for album preview.

### Configure Album

Click the **Configure Album** button to modify the album title, menu text, and visibility. You will see the Photo Page Configuration dialog described above.

### Album Description

Click the **Album Description** button to modify the preamble text placed at the top of the album. You will see the advanced content editor dialog.

## DOWNLOAD BANK

If your club or association has enabled the online Storefront function, and if you have purchased digital files, click this link to see a list of these files for downloading. You will see a screen similar to the following:

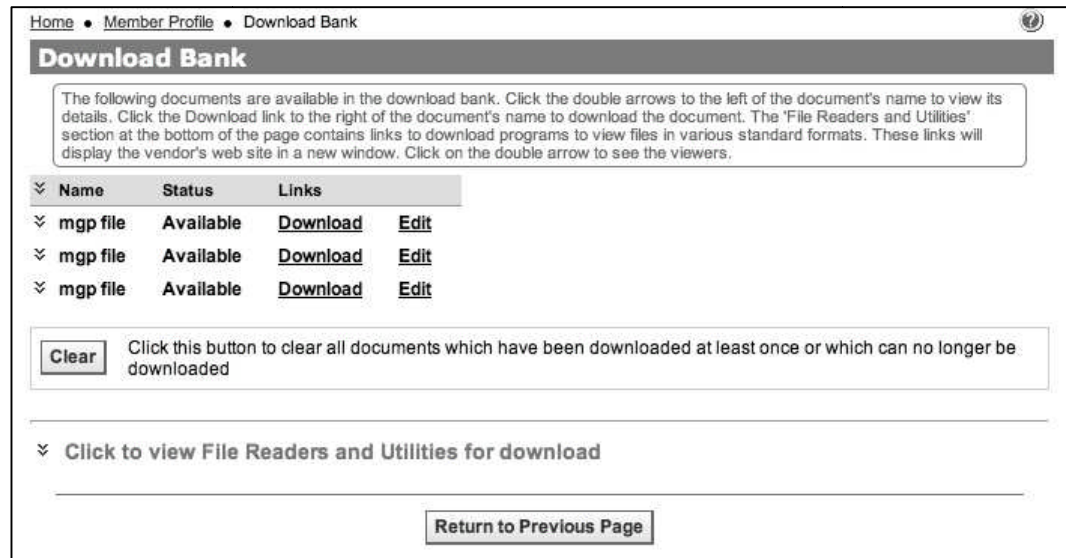


Figure 4.35 – Download Bank

Click the double-arrow character on the left to view details of each document. Click the **Download** link to download the document. The **Edit** link will only appear for administrators; it allows them to update the properties of the document, including its status and expiration date.

Click the **Clear** button to remove from the list all documents that have been downloaded at least once or that can no longer be downloaded because they have expired.

There is also an option to download readers for common file formats. Click **Return to Previous Page** to return to the Profile screen.

## USER MANUAL

Select this option to download a user manual, which explains the features of ClubExpress that are available to members who do not have any administrator rights. You can also view a video that describes the major options on this Profile screen.

## ***BAD EMAIL ADDRESS(ES)***

Membership Summary	
Type: Couple	Join Date: 3/22/2004
Status: Active	Last Renewal: N/A
Exp. Date: 9/30/2007 Payment Due	
NOTE: You have one or more invalid email addresses. <a href="#">Click here</a> to correct them.	

Figure 4.36 – Bad Email Notification

If you see the above message in the Membership Summary panel, you have one or more bad email addresses. Click the link to see a screen similar to the following:

[Home](#) • [Member Profile](#) • [Bad Emails](#)

### Bad Emails

One or more of your email addresses is not receiving emails from Northwestern Balloon Club. Use this page to change or correct the email address(es). The following reasons could be the cause of the problem:

- Invalid Format - the email address is not correctly formatted
- Bad Email - the email address does not exist
- Blocked - deliveries to the email address are blocked by an anti-spam filter
- "Soft" Failure - temporary problem such as the mailbox being full or the mail server being temporarily offline

You have several options for fixing these problems:

- Change the email address
- Reactivate the email address if you believe it will now be able to receive messages (not available if the error is "Invalid Format")
- Drop the bad email notification if you no longer use this address - note that this option removes only the notification; if you still have the email entered in your contact information or forum preferences, it will not be removed and may be used again to try to send messages to you.
- Ignore the error for now - you can come back and correct it later

Email Address	Problem	Disposition
werwerwer	Invalid Format	<input type="radio"/> Change to: <input type="text"/> <input type="radio"/> Reactivate address <input type="radio"/> Drop it - I no longer use this address <input type="radio"/> Ignore error - do not fix

Figure 4.37 – Handling bad email address(es)

ClubExpress allows you to store multiple email addresses, a primary address listed with your account and one or more additional addresses for each discussion forum in which you participate. The above screen may list more than one email address if there have been multiple failures.

If one or more of these addresses have had a delivery failure, it will be listed in this screen, together with one of the following error messages:

**Invalid Format** – the email address is not correctly formatted. It might have invalid characters or one or more spaces.

**Bad Email** – the email address does not exist, as reported by the destination server.

**Blocked** – deliveries to the email address are blocked by an anti-spam filter. This could be on your email server or a blacklist in your email handling program (e.g. Outlook, Lotus Notes, etc.)

**“Soft” Failure** – this is a temporary problem, such as the mailbox being full or the email server being temporarily offline.

Select the appropriate action from the choices in the right-most column:

**Change to** – modify the email address to one that should be valid.

**Reactivate** – if you believe the email address is valid and can now receive emails. (Not available if the error is “Invalid Format”.)

**Drop It** – select this option if you no longer use this email address. This option removes the notification but does not remove the email address from your profile. If it’s used again to send emails to you, it may appear again in this list.

**Ignore Error** – do not fix for now. This is the default choice if you don’t take any action. The error will continue to appear in this list.

Click **Save** to save your choices and return to the Profile screen, or **Cancel** to return without saving.

## Chapter 5 – Blogs

### INTRODUCTION

ClubExpress includes a powerful Blogs (“weB LOG”) module that allows knowledgeable club or association members to publish periodic articles of interest. The system maintains a history and allows readers to navigate through all published articles. RSS is fully supported, allowing readers to subscribe to a blog feed so that they are notified when a new blog entry is published.

The system includes a full set of blog management and authoring tools, using the advanced content editor to allow blogs that include formatting, images, videos, links, etc.

In the ClubExpress model, an administrator or blogs module coordinator creates a blog and then hands it over to a blog author to manage. So if you want to author a blog on the club’s website, contact an administrator.

Blogs will generally be accessed via a choice on the menu. A typical Blog opening screen is shown below:

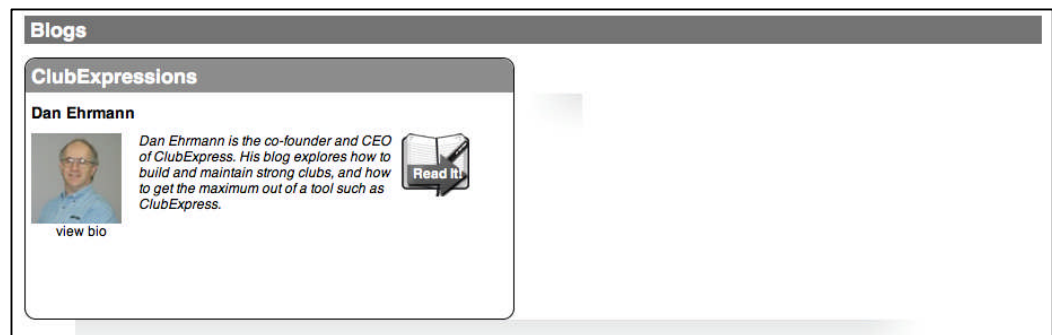



Figure 5.1 – Blogs main screen

For non-members, this screen will show all blogs that are flagged as visible to the public. Members-only blogs are not shown unless you are logged in. Click the **Read Blog** button to read the most recent entry for a blog. You will see a screen similar to the following:

## Is the show getting tired?

4/16/2013 4:06 PM



Been very busy here at ClubExpress, moving to a new office, then my wife and I visited New York for the engagement of my nephew. Apologies for the break in posting.

While in New York, we naturally took in a Broadway show, specifically Chicago! Having seen and loved the movie, which won multiple Oscars including Best Picture, we thought it would be a good choice. The musical has been running on Broadway continuously since 1996, holding the record for the longest-running revival at more than 6700 performances and counting.

And, frankly, it shows! The musical was a big disappointment for us. The staging is minimal since the orchestra occupies most of the stage, leaving just a narrow area in front. There are no sets to speak of and minimal props. Some of the actors were great but others really seemed to just be going through the motions.

Of course, Broadway is mobbed every night and they have no trouble filling the house for \$120 to \$200 a night. But after the movie came out, I expect that many people's expectations changed. They could have done a much better job of staging the prison scenes and courtroom.


If my point is not yet obvious, clubs and associations can take lessons from Broadway musicals. Just because something has worked for years and years doesn't mean it should always be done the same way! Have circumstances changed? Have expectations changed? Have "customers" changed?

One way to keep members and visitors interested and participating is to periodically look at your major programs to see how they could be restaged. Perhaps hand them over to a different "director" instead of the same team doing the same thing, year after year.

**0 Comments**

[Click here to view or add comments](#)

[Return to Previous Page](#)

Subscribe 

**Author Tools**

[Maintain Posts](#)

[Add Post](#)

**Recent Posts**

Is the show getting tired?  
4/16/2013 4:06 PM

[Charge Reasonable Dues](#)  
2/18/2013 10:27 AM

[Renewal and Expiration Not...](#)  
2/15/2013 10:22 AM

**Blog Archive**

▼ [April 2013](#)

▼ [February 2013](#)

▼ [January 2013](#)

Figure 5.2 – Reading blog entries

The most recent blog entry is shown with its title and the date-time it was posted.

## Comments

**0 Comments**  
Click here to view or add comments

Comments are subject to editing or deletion at the blog author's or club's discretion.

Handle Theater Fan

I agree; the show is tired and needs a complete revamping.

Max 500 characters - 442 characters left

Save Cancel

top of page


Figure 5.3 – Adding a comment

If the blog allows comments, you will see a comments panel below the blog entry, with the most recent comment at the top. Click the **Add Comment** link to display a panel that prompts for a handle and your comment. Click **Save** to post your comment or **Cancel** to cancel without posting.

## About this Blog

**Membership Directory**

Dan Ehmann (#15)



Title President  
Company ClubExpress  
Company Website [www.clubexpress.com](http://www.clubexpress.com)

[What is this?](#)

**Blogs**  
[ClubExpressions](#)

Dan has 25 years of experience developing custom software solutions designed to fit client needs. ClubExpress is his fifth startup venture; of the previous four, two were successful and two were not and he learned as much from the latter as from the former. Dan previously served as Managing Partner of the Chicago office of USWeb, and as founder and President of Kallista, Inc., a custom application development firm that he ran for 11 years before selling it to USWeb. During his career, Dan has spoken at more than 30 software conferences in 10 countries. He is the author of two books and over 100 articles on database programming topics. Dan was formerly an Adjunct Professor at DePaul University in Chicago, teaching graduate classes. He is also the past-president of a Chicago car club. Dan is married with three children.

Figure 5.4 – About this Blog

Click the author's photo and you are taken to the author's Bio page.

## Recent Posts

Below the photo is a listing of recent posts and below that is a month-by-month archive. Click the arrow beside each month to expand or collapse that month.



Figure 5.5 – Recent Posts

## RSS Support



The blogs function fully supports RSS (Really Simple Syndication). Your browser will detect that the current page supports RSS and will display its standard RSS toolbar icon, which can be clicked to subscribe. Use your RSS reader's management tools to unsubscribe from a blog.

You can also click the **Subscribe** link at the top to subscribe to the RSS feed of this blog.

## BLOG MANAGEMENT FOR AUTHORS

If you are a blog author, and logged in to the website, a panel showing Author Tools replaces your photo:

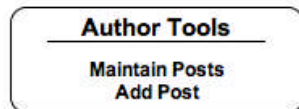


Figure 5.6 – Blog Author Tools

When you click the **Add Post** link, you will see a popup window showing the advanced content editor. See below for more information.

When you click the **Maintain Posts** link, you will see a screen similar to the following:

Posts Manager				
Use this screen to manage blog posts. Click "Add Post" to create a new post, or "Edit Blog Properties" to change this blog's properties.				
Blog: ClubExpressions				
<a href="#">Add Post</a>	<a href="#">Edit Blog Properties</a>			
Title	Visible	Published Date	Maintain	
Is the show getting tired?	✓	4/16/2013 4:06 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
Charge Reasonable Dues	✓	2/18/2013 10:27 AM	<a href="#">Edit</a>	<a href="#">Delete</a>
Renewal and Expiration Notices	✓	2/15/2013 10:22 AM	<a href="#">Edit</a>	<a href="#">Delete</a>
The 3rd "P" - Price	✓	2/13/2013 10:12 AM	<a href="#">Edit</a>	<a href="#">Comments</a> <a href="#">Delete</a>
There's one in every club!	✓	2/11/2013 1:54 PM	<a href="#">Edit</a>	<a href="#">Delete</a>
Hosting your Club Website	✓	2/05/2013 1:10 PM	<a href="#">Edit</a>	<a href="#">Comments</a> <a href="#">Delete</a>
Planning your Club Website	✓	2/03/2013 12:50 PM	<a href="#">Edit</a>	<a href="#">Delete</a>

Figure 5.7 – Posts Manager

The grid lists each post in descending date order, showing the post title and date of publication, and whether the post is currently visible. Click the **Add Post** button to create a new post. You will see the following screen:

Figure 5.8 – Add Blog Post

Specify the title for your post and whether it should initially be hidden (perhaps because it's a draft) or immediately visible. If you choose to make the post immediately visible, you can also specify which date should be assigned to the post:

- The original creation date;
- The date you are making it visible (today).

Below is the standard ClubExpress advanced content editor, with all its available tools for creating web content, including formatting and layout tools, the link builder and the ability to insert photos and videos. Click **Save** to save your new blog post, or **Cancel** to close the dialog without creating a new post.

Click the **Edit** link to modify an existing blog post. The same dialog will be displayed. Click **Delete** to delete a blog post. You will be asked to confirm this operation. If you select **OK**, the blog post will be completely deleted and cannot be recovered.

## Viewing and Editing Comments

Click the **Comments** link to view and edit comments. You will see a screen similar to the following:

The screenshot shows the 'Comments Manager' interface. At the top is a navigation bar with links: Home, Blogs, Read Blog, Posts Manager, and Comments Manager. Below this is a header section with the title 'Comments Manager' and a sub-header 'Blog: Northwestern Balloon Club's Blog (Martin Smith)'. A message box states: 'Use this screen to view and / or edit comments about blog posts.' Below this, it shows the current post: 'Post: New Supplier... (published on 10/13/2010 3:24 PM)'. The main content area displays a table of comments.

Comment	Maintain
Hank Johnson 10/13/2010 3:40 PM Marty,  Thank you for pointing me in the direction of Joe's Ace.  Hank	<a href="#">Edit</a> <a href="#">Delete</a>
Michelle (Admin) True 10/13/2010 3:25 PM Thanks Marty, I can use a few things so I will head over there this weekend!	<a href="#">Edit</a> <a href="#">Delete</a>

At the bottom of the interface is a button labeled 'Return to Previous Page'.

Figure 5.9 – Post Comments

Comments are listed in descending date order. Click the **Edit** link to modify a comment that might be inappropriate. Click the **Delete** link to remove it completely; you will be asked to confirm this action.

## Blog Properties

Click the **Edit Blog Properties** button to modify the settings of your blog. You will see the following dialog:



The dialog box is titled "Add/Edit Blog" and contains the following fields and controls:

- Title:** A text input field containing "Hank Johnson's Blog".
- Author:** A text input field containing "Hank Johnson", followed by "Select" and "Remove" buttons.
- Description:** A large text area for the blog description.
- Character Count:** A label below the description area indicating "Max 400 characters - 400 characters left".
- Allow Comments:** A checkbox that is checked.
- Visibility:** A dropdown menu currently set to "Members Only".
- Active:** A checkbox that is checked.
- Buttons:** "Save" and "Cancel" buttons at the bottom.

Figure 5.10 – Edit Blog Properties

You can modify the title and description of your blog, whether comments are allowed, who can see the blog and whether it's currently active. Click **Save** to save your changes or **Cancel** to close the dialog without saving.

The **Add Post** button is also available to blog authors on the main blog page.

## Chapter 6 – Chapter Finder

### INTRODUCTION

If your club or association is configured as a Parent club with local chapters, the Chapter Finder module allows website visitors and members to locate chapters. Selecting this option from the menu displays one of the following four options (based on how the club has configured this module):

US Map

US/Canada Map

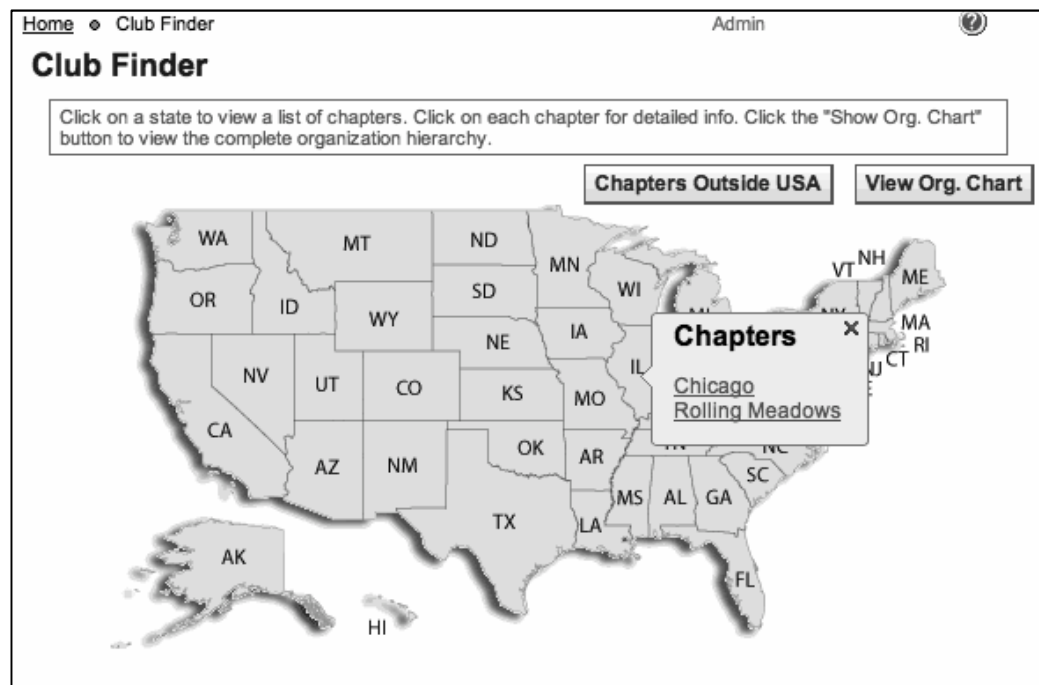


Figure 6.1 – Chapter Finder using Standard Map

Click a state or Canadian province to see a list of chapters in that state or province. When you click a chapter name, you'll see contact details for that chapter.

## Google Map



Figure 6.2 – Chapter Finder using Google Map

A standard Google icon shows the location of each chapter. Click the icon to display information about that chapter. You may also see an aggregator icon with a number in the middle indicating multiple chapters in close proximity. Click this icon to zoom in and see the individual chapters.

## Organization Chart



Figure 6.3 – Chapter Finder using Organization Chart

This option shows the hierarchy of chapters, districts and regions in the club or association. It's used by organizations where chapters do not necessarily map to a geographic location. Click a subgroup at any level to display details about that subgroup.

This organization chart option is also available for each of the map options, allowing users to display this hierarchy even if one of the maps is configured by default.

## Viewing International Chapters

If your club or association has chapters outside the US and Canada, you can optionally display a special button that, when clicked, displays a list of these chapters.

## Chapter 7 – Committees

The Committees module allows clubs and associations to track the various committees and other organized groups of members that are chartered to fulfill the group's objectives. Committees include the Board of Directors and its subcommittees, as well as working groups built around events, publicity, the newsletter or website.

In the ClubExpress model, committees can be created or deleted at any time. Committees can be open where any organization member can be a member of the committee and duration is not tracked; or closed, where the membership is fixed and members have a term of office (such as with the Board of Directors.)

A typical Committees screen is shown in the figure below:

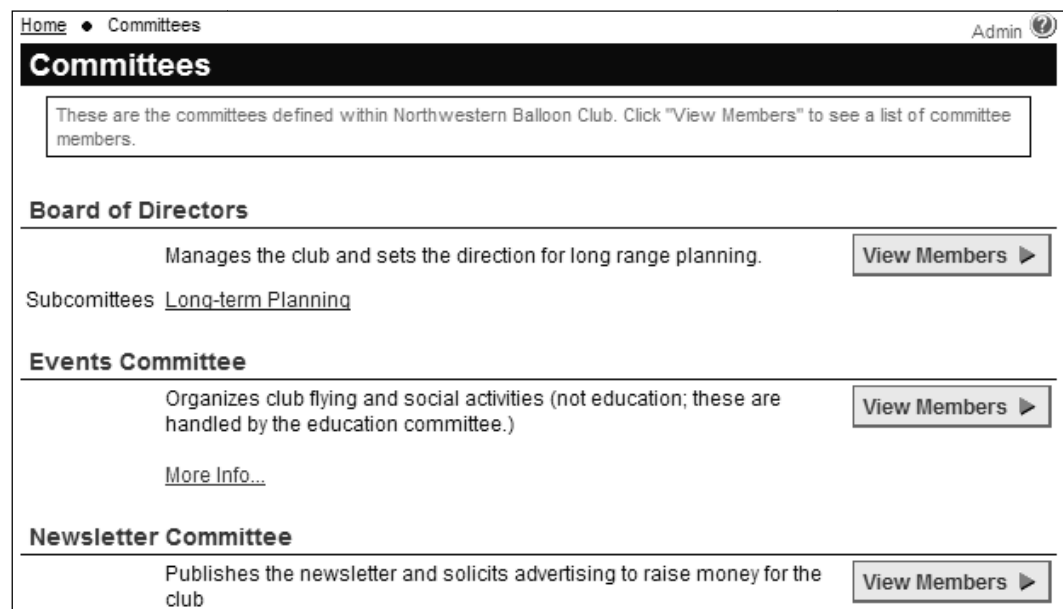


Figure 7.1 – Committees

Each committee is listed, with its description. If the committee has subcommittees, they are also listed with a link. You can also define a custom page to hold more information about a committee; click the **More Info...** link to jump to the page. Click the **View Members** button to see a list of members:

Home • Committees • Members

## Board of Directors Members


This screen shows the members of the committee.

### Board of Directors

Manages the club and sets the direction for long range planning.

[Send Email to Members](#) [Sign Me Up](#)


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---



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**Jessica Smith**      **General Member**

Email:  
Phone:

---



**Martin Smith**      **Webmaster**

Email: [info@clubexpress.com](mailto:info@clubexpress.com)  
Phone: 847-255-0210

Figure 7.2 – Committee Members

The names are links that can be clicked to display that member's directory entry, including contact information (unless the member has suppressed this information from his or her directory entry.)

If you are a member of the committee, you will see a button that allows you to email the other members of the committee. Click this button to display a popup form, complete the form and click the Send button to send the email.

Click the **Sign Me Up** button (if this option is enabled) to volunteer for this committee. If you are already a committee member, click **Remove Me** to resign from the committee. This option will only be enabled for committees with an open membership.

## Chapter 8 – Discussion Forums

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### ***INTRODUCTION***

ClubExpress includes a powerful discussion forums module, allowing members to participate in online discussions on a variety of topics. Original messages and their replies are organized into threads that are listed within a forum. Forums in turn are grouped into categories, allowing a club or association to organize forums for different purposes.

Forums configured as an email list (“listserver”) push messages out to forum members’ email boxes and allow members to reply via email. The reply is posted to the forum and then sent back out to every forum member. But these forums can also viewed online like any other forum and are fully integrated into the rest of ClubExpress.

Clubs have full control over forum membership. Forums can be defined where all members have access by default, or where members can opt-in, or where a moderator adds members manually. Clubs can also build forums around an interest group, a committee or a member type, and ClubExpress will maintain forum membership automatically.

ClubExpress supports multiple views, message posting icons, forum handles, message attachments, user pictures, rich content within messages and many user-configurable options. There is also a full suite of administration tools at the forum, thread and message levels.

Forums can be configured to be moderated, where new messages must first be approved before they are made visible. Individual members can also be moderated so that only their messages must be approved. Administrators and moderators can also block members from posting completely if they are not following forum rules.

Forums can be placed on the public side of the club’s web site, to make their content available to any site visitor. But in this position, they will be read-only; all editing functionality is disabled.

## NAVIGATING FORUMS

Home • Forums

Admin

Forums

Search

Our Forums Policy

Public Forums

All public forums

Forum	Threads	Posts	Last Post
<a href="#">Safety</a> Public Active This forum focuses on safe flying, including equipment maintenance, certifications, FAA regs, and what to do in an emergency	16	57	9/20/2007 5:33 PM ◆
<a href="#">Equipment</a> Public Active This forum focuses on equipment, including what to buy for different skill levels and needs, how to assemble and how to maintain. Safety issues are handled in the safety forum	5	11	9/19/2007 9:54 PM
<a href="#">Official Club Business</a> Public Active Anything to do with the operation of the club, including board meetings, finances, bylaws, facilities, etc.	5	12	7/11/2006 4:21 AM

Figure 8.1 – Forum categories and forums

This screen shows the forum categories and forums defined by your organization. Each forum includes a brief description of the forum's purpose, the number of threads and posts in the forum and the date of the last post.

If messages were posted to forum since your last visit, a blue diamond in the **Last Post** column will be shown.

Next to a forum's name is its blue Visibility setting (Public, Club Members Only or Forum Members Only) and its red Status setting (Active, Not Active, Locked or Archived). Admins will see these settings for ALL forums. Moderators and coordinators will only see visibility and status links for the forums they moderate/coordinate.

Click **Search** to search for specific messages. Click **Our Forums Policy** (if shown) to view the club's policies for maintaining harmonious and smoothly-running forums. These options are described in more detail below.

### Drilling into a Forum – Threads of Messages

Clicking the forum name displays a list of threads in the forum, as shown in the following screen:

Home • Forums • Equipment

## Equipment

This is a list of the threads in the forum you selected. Click on Started By, Subject or Last Post to sort the threads into the corresponding sequence. Click on a thread name to view the messages in that thread. \*Note: The Views counter shows how many times the thread has been viewed since 5/29/2010.

[Start New Thread](#)
[My Forum Preferences](#)
[Forum Admin](#)
[Members](#)

Search This Forum  [Go](#)

Go To [General Interest Forums : Equipment](#)

Started By	Subject	Msgs	Views*	Last Post ▼	Admin
Bo	? <a href="#">Looking for EB34 burner flange</a>	1	12	4/11/2011 2:52 PM by Bo	<a href="#">Admin</a>
Jonesy	<a href="#">Hello kitty</a>	1	6	1/7/2011 11:06 AM by Jonesy	<a href="#">Admin</a>
Jonesy	<a href="#">New Subject</a>	1	11	6/30/2010 6:23 PM by Jonesy	<a href="#">Admin</a>
Jonesy	? <a href="#">New Burner - Anyone Tried?</a>	4	74	12/18/2009 9:22 AM by Jonesy	<a href="#">Admin</a>
Jonesy	<a href="#">Just testing</a>	1	4	9/5/2009 7:42 PM by Jonesy	<a href="#">Admin</a>
msmith	<a href="#">Sticky Release Value</a>	1	5	7/21/2009 11:35 AM by msmith	<a href="#">Admin</a>
msmith	<a href="#">Financial Accounts?</a>	1	77	6/25/2009 12:18 PM by msmith	<a href="#">Admin</a>

Figure 8.2 – Forum threads

Each row is a separate thread, showing the author of the first post, the thread subject, number of messages in the thread, the number of times the thread has been viewed (since 5/29/2010 when this feature was added), and the date and author of the most recent post. You can change the sort order by clicking the **Author**, **Subject** and **Last Post** headings. Clicking on a heading a second time changes the direction of the sort.

A thread can be “pinned” to the top of a forum so that it's always visible. Pinned threads are shown with a different background color and a pin icon.

If messages were posted to forum since your last visit, a blue diamond in the **Last Post** column will be shown.

If there are more threads in the forum than will fit on a single screen (based on the number of messages per screen configured in your profile), the **Prev**, **Next**, and paging controls will be active, allowing you to move to any page of threads.

To select a different forum, click the **Select Forum** drop-down in the top right corner. To start a new thread, click **Start New Thread** in the top left corner.

To modify your individual preferences for this forum, click the **My Forum Preferences** button. You will be taken to the preferences screen in your Profile, described in detail in Chapter 8.

If you're configured as a Moderator of this forum, the **Members** button allows you to view and update “special” members in the forum, including those who are

banned from posting in the forum and those whose messages must be moderated. See below for more details.

## CREATING MESSAGES

Click the **Start New Thread** button to start a new thread. You will initially see the simple message editor, shown below.

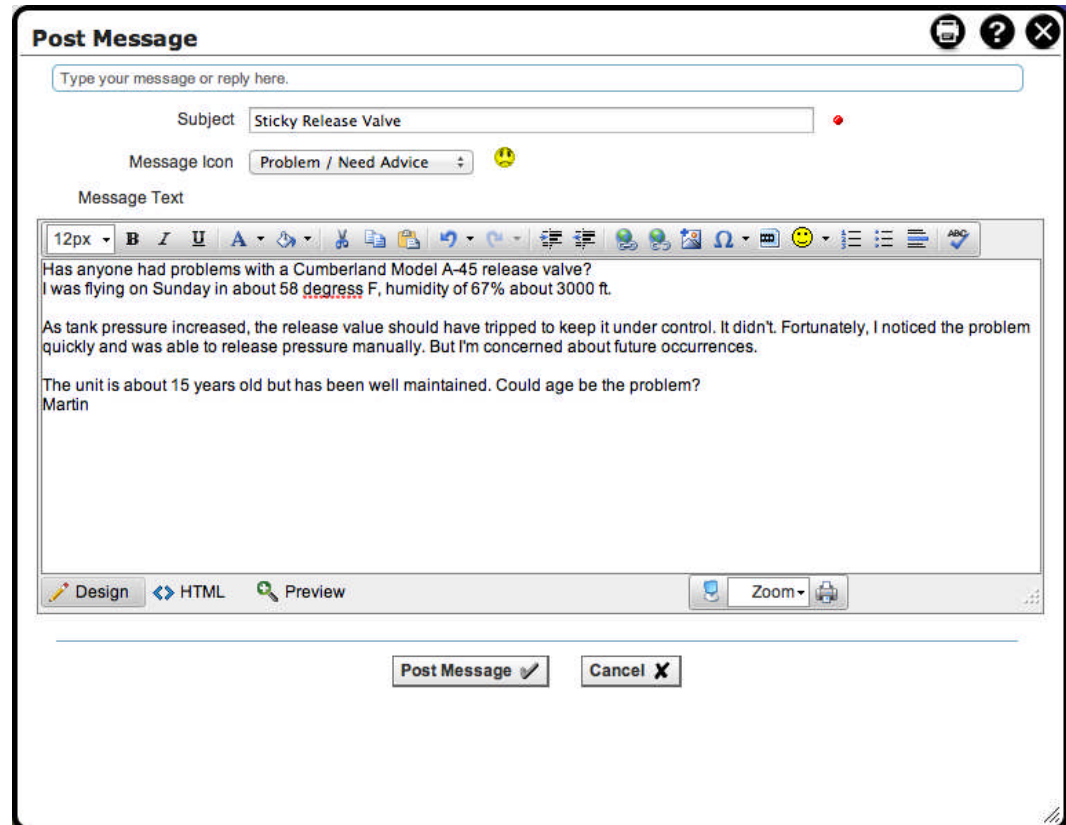


Figure 8.3 – Post Message – basic editor

Specify the subject and optionally, a message icon from the drop-down list. Then enter the message text and click **Post Message**. The message will be added to the forum.

In your profile, you can also set an option to use the advanced content editor, described in detail in Chapter 17. This editor provides support for fonts, attributes, tables, indenting, bullets, images, horizontal rules, etc.

If you are moderated in the forum or the forum is moderated, you will see this message displayed after you create and save the post:

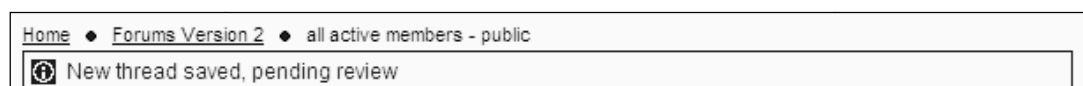


Figure 8.4 – Message if member or forum is Moderated

## Adding Attachments to a Message



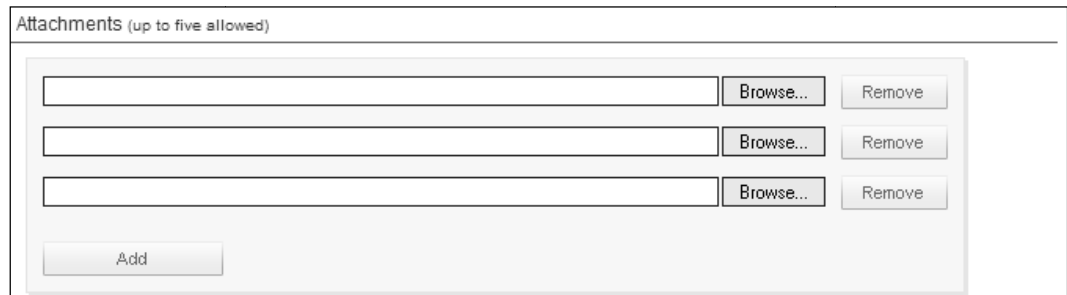
To add attachments, click the paperclip icon at the bottom of the window. The screen will refresh to show the following panel:



The screenshot shows a panel titled "Attachments (up to five allowed)". Inside the panel, there is a single text input field. To the right of the input field are two buttons: "Browse..." and "Remove". Below the input field is an "Add" button.

Figure 8.5 – Adding an attachment to a message

Click the **Browse** button and select a file from your computer or network. It will be added to the message. If you want to add another file, click the **Add** button to display another "Browse" field, as shown below.



The screenshot shows the same "Attachments (up to five allowed)" panel, but now it contains three rows of input fields. Each row has a text input field, a "Browse..." button, and a "Remove" button. At the bottom of the panel is an "Add" button.

Figure 8.6 – Adding multiple attachments to a message

You can attach up to 5 files to each message and the maximum size of each message, including attachments, is 2MB. If you want to remove a file, click the **Remove** button beside that filename.

When you post the message, the files are not physically attached. Instead, the message includes links back to each file. Clicking the link gives you the option of opening the file or saving it to your local hard disk. You must be connected to the Internet to view or save attachments.

## VIEWING MESSAGES WITHIN A THREAD

In the Thread List screen, clicking a thread subject allows you to view the individual messages within the thread. There are two views, shown in the following two screens.

Author	Subject	Posted
▶ Jonesy	? New Burner - Anyone Tried?	8/19/2007 9:09 AM
msmith	re: New Burner - Anyone Tried?	8/19/2007 9:22 AM

Figure 8.7 – Thread: Thread View

“Thread View” shows the current message at the top of the screen with a thread list underneath showing the hierarchy of messages and replies. If the current message has attachments, they are listed below the body of the message. Clicking the link allows you to open or save the file.

In the tree, the current message is indicated with a red arrow in the Author column. New messages since your last visit are flagged with a blue diamond in the Posted column. Messages with attachments have a paperclip indicator in the Subject column. To view a different message in the thread, click the **Subject** heading in the tree view below the current message.


Administrators can click the member’s handle name to display a popup with the members actual name and email address, as well as message handling options.

You can also view messages in “Flat View”, similar to the sample below:

Home • Forums • Equipment • Messages

### Equipment: New Burner - Anyone Tried?

[Return to Forum](#) [Subscribe](#) [Switch To Threaded View](#)

Author	Subject	Last Post
Status	re: New Burner - Anyone Tried?	8/19/2007 9:24 AM
 <a href="#">Edit</a> <a href="#">Admin</a>	<p>We've been using the new burner for weeks as part of the beta test. No problems at all.</p> <p>Dan</p>	
<a href="#">msmith</a> Status Martin Smith Chicago, IL   <a href="#">Edit</a> <a href="#">Admin</a>	re: New Burner - Anyone Tried? <p>Higher pressure means that there's more risk or an explosion. I wouldn't take the risk.</p>	8/19/2007 9:22 AM
<a href="#">Jonesy</a> Status Barbara Jones Anytown, IL   <a href="#">Edit</a> <a href="#">Admin</a>	New Burner - Anyone Tried? <p>There's a new type of burner being announced tomorrow by Cameron. It has a narrower nozzle and higher temperature to create more lift.</p>  <p>Has anyone used this new type and can recommend it?</p> <p>Regards, BJ</p>	8/19/2007 9:09 AM

[Return to Forum](#)

Figure 8.8 – Thread: Flat View

This view shows every thread message fully expanded. You cannot see the hierarchy of messages, but it is easier to browse and read everything without having to continually click to a new message. New messages since your last visit are flagged with a blue diamond in the Posted column. Messages with attachments have an attachment section below the body of the message. Flat view can also be sorted by the same three fields as the thread view: Author, Subject and Post Date.

Both views have the same format for the message(s) shown:

Author's "handle"	Subject with post icon	Posting date and time
Author's name Author's city, state Author's photo  REPLY button <u>Edit</u> <u>Admin</u> links	Message body  <hr/> Attachment File List	

Note that authors can suppress display of their name, city, state and photo. Note also that the Edit link will only appear if this option has been enabled for this forum by a club administrator or forum coordinator.

For each view, users can separately configure the number of messages to show. If there are more messages than can be shown on one page, the **Prev**, **Next**, and paging controls will be active, allowing you to move to any page of messages within the current thread. To return to the list of forum threads, click the **Return to Forum** button in the top right corner.

### Subscribing to a Thread

When this option is enabled, you will see a **Subscribe** button at the top of the screen. Click it to subscribe to a thread. Whenever a new message is posted to the thread, you will be notified by email.

If you are already subscribed, the button changes to **Unsubscribe**. Click it to no longer receive notifications by email. There is also a screen on the Profile to view and update all forum subscriptions.

Members can only subscribe to a thread if this option has been enabled for the forum. If the forum is configured as a listserver (forum posts are emailed to members), subscriptions are only available if the member is not already receiving each forum message by email. Members will receive the complete posting via email. If the forum is not configured as a listserver, subscriptions are always available; members receive a notification about a new posting, including a link to the site to read the message.

If a thread is deleted, a subscription to that thread is also deleted. If a thread is moved to another forum, the subscription will be moved as well. Subscription messages always use the member's primary email address from the member Contact Info screen.

## Replying to a Message

Click the **Reply** link to reply to a specific message. You will see a screen similar to the following:

Figure 8.9 – Replying to a message

This screen displays either the basic message editor or the advanced content editor, depending on how your profile is configured.

If the sender of the message to which you are replying allows private replies, you will see a **Reply Type** option at the top of the screen. You can either reply as a public message to the forum or send a private reply via email.

If you click the [Quote Previous Message](#) link, the system inserts the contents of the message you are replying to, using a GroupBox control. You can edit the quotation by double clicking inside the GroupBox, perhaps to remove parts of the reply that are not relevant to your comments. (Please do not modify or delete the container of the quoted text. This helps us manage the quotes and display them nicely in discussion forums.)

When you click **Post Message**, the message is saved and sent, either to the forum or, if you clicked “Private Reply”, as an email to the other member.

---

## ***FORUM POSTING VIA EMAIL***

In addition to posting a thread by clicking the **Start a Thread** button, forum members can start new threads by sending an email to the forum's email address, if the forum has been set up to allow posting via email.

Forum members can also reply to messages sent from the forum via email. There is a footer included in each message that includes a link to the thread that the message belongs to.

To start a new thread via email, send an email to the email address of an active forum you are a member of (i.e. [BuySell@myclub.com](mailto:BuySell@myclub.com)). Your email will create a thread. The title will be whatever you have entered in the Subject field of your email.

You can also reply to an existing message that you see in the email you received from the forum. Simply click on the link provided. Make sure you delete any extraneous text (other messages, footer information, etc.) before you send the email.

If an incoming message has more than five attachments, it is posted with the first five, and a note is sent back to the sender that this was done. If a forum does not allow attachments and an incoming message has them, it is posted without its attachments, and a similar note is sent back to the sender.

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## ***MEMBER PROFILE***

When discussion forums are available, a **Forums General Preferences** choice is added to the user Profile screen. This choice allows you to control your individual preferences for viewing messages and threads, authoring messages, and the personal information displayed.

A second choice, **Forum Memberships**, allows you to subscribe to forums (and unsubscribe as well) and to customize your preferences in each forum that you are a member of.

For more information, see Chapter 4 – Member Profile.

## SEARCHING THROUGH MESSAGES

From the main Forum screen, click the **Search** button. The following screen is displayed:

Figure 8.10 – Forum Search

Type in one or more words for which to search and specify a search type, date range and forum:

### All Words

The system will find every message that includes all of the specified words. For example, if you specify "red blue green", the system does an internal search for "red AND blue AND green", finding matching messages that include all three words. You do not need to include the word "AND" in your search.

### Any Word

The system will find every message that includes any of the specified words. For example, if you specify "red blue green", the system does an internal search for "red OR blue OR green", finding matching messages that include any of the listed words. You do not need to include the word "OR" in your search.

### Exact Phrase

The system will find the exact phrase that you entered. For example, if you specify "red and green balloons", the system finds messages that include that exact phrase (case insensitive).

### Advanced (Boolean)

With this option enabled, the system allows you to construct an advanced search, including the following special operators:

- AND
- OR
- NOT
- NEAR
- ( ) - Parentheses to indicate grouping
- " " - Quotation marks to indicate an exact phrase
- \* - Asterisk to indicate a wildcard (for example, "bl\*" to find "black" and "blue") Note that a wildcard search term must be enclosed in double quotes as shown above.

This option is for users who have more experience with programming models or other search systems.

### Fuzzy

This option uses an internal thesaurus to search using words with similar meanings to the phrase you entered. Note that AND, OR, \*, etc. do not work with this option. Enter a simple phrase and the system will find messages including that phrase and related phrases.

### Post Date Range

You can further filter the search to messages posted within a specified date range, including the past week, month, two months, six months, year, or an explicit date range.

### Select Forum

Specify a forum or use the <All Forums> option search across all active forums.

When you click **Search**, a screen similar to the following will appear:

Home • Forums • Search

## Search

Search for messages by entering text in the "Search For" field, and pressing the "Search" button. Optionally you may select a specific forum to search. Note that no more than 100 messages will be returned.  
Fields marked \* require an entry.

### Search For Messages

Search For

Search Type ☒ All Words ☐ Any Words ☐ Exact Phrase  
☒ Advanced (Boolean) ☐ Fuzzy

Post Date Range

Select Forum

---

### Search Results (5 messages found)

Subject	Author	Posted
<a href="#">New Burner - Anyone Tried?</a>	Jonesy	8/19/2007 11:09 AM
<i>There's a new type of burner being announced tomorrow by Cameron. It has a narrower nozzle and higher temperature to create more lift. Has anyone used this new type and can recommend it? Regards, BJ</i>		
<a href="#">re: New Burner - Anyone Tried?</a>	Dan95	8/19/2007 11:24 AM
<i>We've been using the new burner for weeks as part of the beta test. No problems at all. Dan</i>		
<a href="#">Looking for EB34 burner flange</a>	Bo	4/11/2011 2:52 PM
<i>Anyone know where I can find an EB34 flange?</i>		
<a href="#">New Burner - Anyone Tried?</a>	Jonesy	12/18/2009 9:22 AM
<i>Full Steam Ahead, Jonesy Chicago, IL mailto:dan@clubexpress.com hghghghghghghghg</i>		
<a href="#">re: New Burner - Anyone Tried?</a>	msmith	8/19/2007 11:22 AM
<i>Higher pressure means that there's more risk or an explosion. I wouldn't take the risk.</i>		

Figure 8.11 – Forum Search Results

The first 100 matches are shown. When you click the link in the Subject column, it will take you directly to that message. You can click **Return to Search** to go back to the search screen.

## Chapter 9 – Documents

The Documents module allows a club or association to store and organize documents that can be downloaded by visitors and members. Documents are organized into folders and can be specified with a title, description, author(s), creation and revision dates, size, format and other information.

A club or association can also optionally allow members to upload documents that must then be approved to become visible for others to download. Related options allow members to rate documents and to view aggregate ratings, and to add comments about documents.

ClubExpress supports documents of any size; there is no restriction on the number and size of documents that can be stored in the system and made available for the legitimate purposes of the organization.

A typical document category screen is shown below.

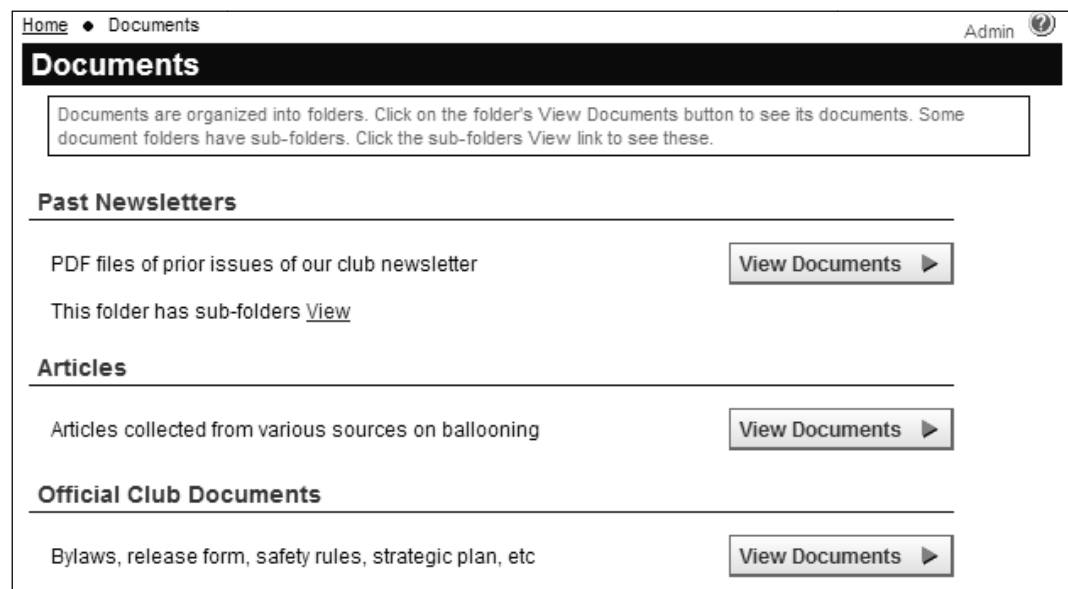


Figure 9.1 – Document Categories

If the current category has sub-categories, click the [View](#) link to display a similar screen showing the sub-category and its documents.

Clicking **View Documents** displays a screen similar to the one below.

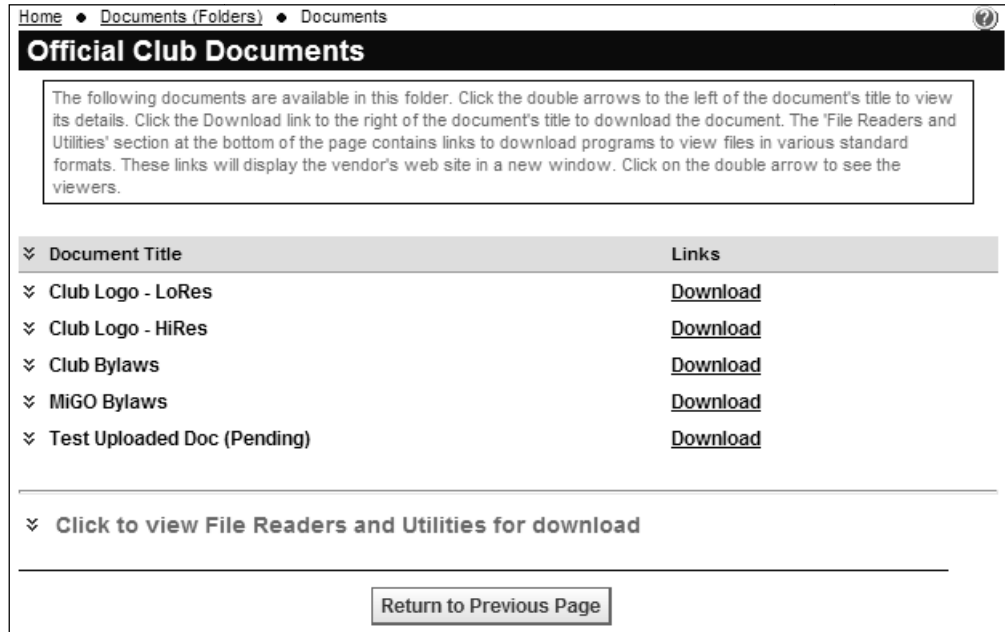


Figure 9.2a – Documents within a category

To view the details of a document, click the double-down arrow to the left of the title. You will see a display similar to the following:

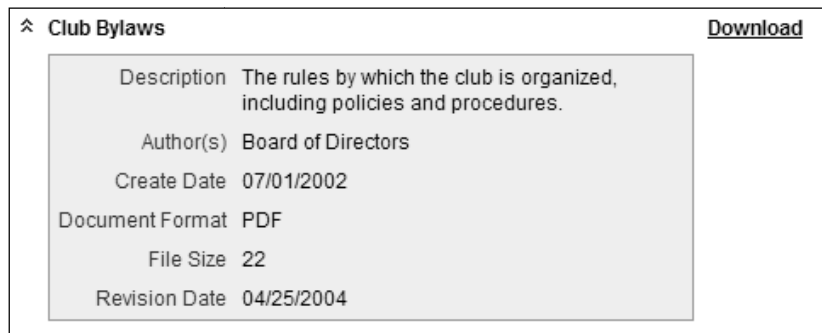


Figure 9.2b – Viewing document details

Click the double-up arrow to hide this display. You can also show details for all documents in the category by clicking the double-down arrow beside the **Document Title**. To display links to popular file readers, click the double-down arrow near the bottom of the screen.



Figure 9.2c – Viewing file readers and utilities

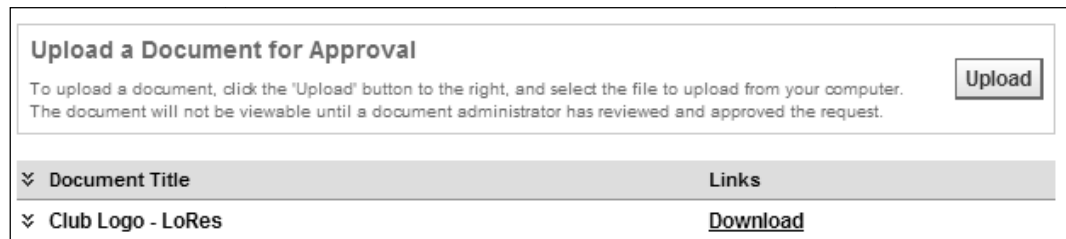
If the document category is visible to members of a committee only, and you are a member of the committee, you will see an **Add Document** button, allowing any committee member to upload documents. (See the section below for more info.)

## UPLOADING, RATING AND COMMENTING ON DOCUMENTS

The documents module also supports advanced options that allow you to upload documents into a folder and allows other members to rate these documents and to comment on them.

### Document Uploading

If document uploading is enabled, you will see a special option near the top of the page:



**Upload a Document for Approval**

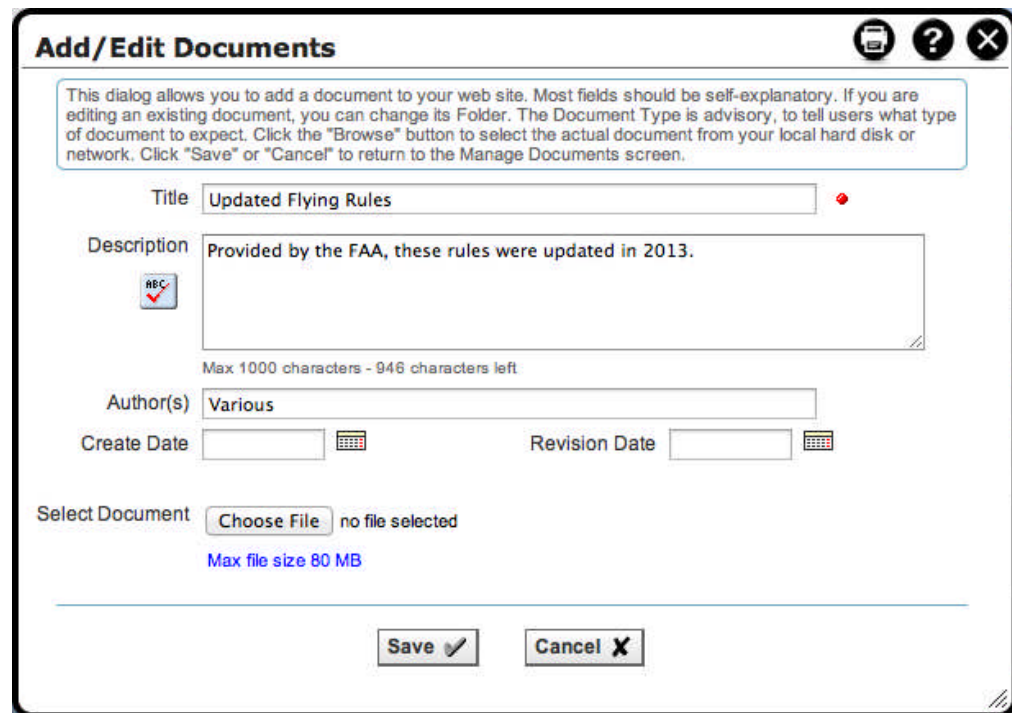
To upload a document, click the "Upload" button to the right, and select the file to upload from your computer. The document will not be viewable until a document administrator has reviewed and approved the request.

**Upload**

Document Title	Links
Club Logo - LoRes	<a href="#">Download</a>

Figure 9.3a – Upload documents option

Click the **Upload** button to see the following dialog:



**Add/Edit Documents**

This dialog allows you to add a document to your web site. Most fields should be self-explanatory. If you are editing an existing document, you can change its Folder. The Document Type is advisory, to tell users what type of document to expect. Click the "Browse" button to select the actual document from your local hard disk or network. Click "Save" or "Cancel" to return to the Manage Documents screen.

Title:

Description:   
 Max 1000 characters - 946 characters left

Author(s):

Create Date:  Revision Date:

Select Document:  no file selected  
 Max file size 80 MB

Figure 9.3b – Upload document dialog

Enter the requested information and specify a filename from your local hard disk. Click **Save** to upload the document or **Cancel** to close the dialog without uploading.

Documents are uploaded with a special *Pending* status. They are not visible until an administrator or module coordinator has approved them.

## Rating Documents

If document rating is enabled, you will see a special option below the document information panel:

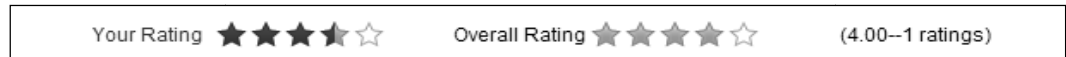


Figure 9.4 – Rating documents

The section on the left allows you to click on 1 through 5 stars to specify a rating. The section on the right shows the aggregate ratings to date, rounded to the nearest ½ star. The actual numerical rating is also shown (straight average.)

## Commenting on Documents

If document comments are enabled, you will see a special option below the document information panel:

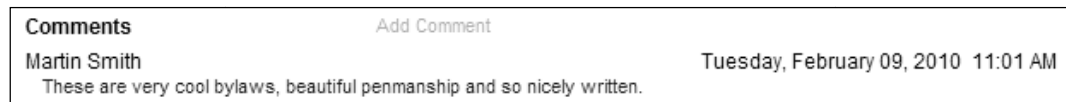


Figure 9.5 – Commenting on documents

Each comment is prefaced by the member's name who made the comment and the date/time when the comment was posted. To add a comment, click the **Add Comment** link. You will see the following dialog:

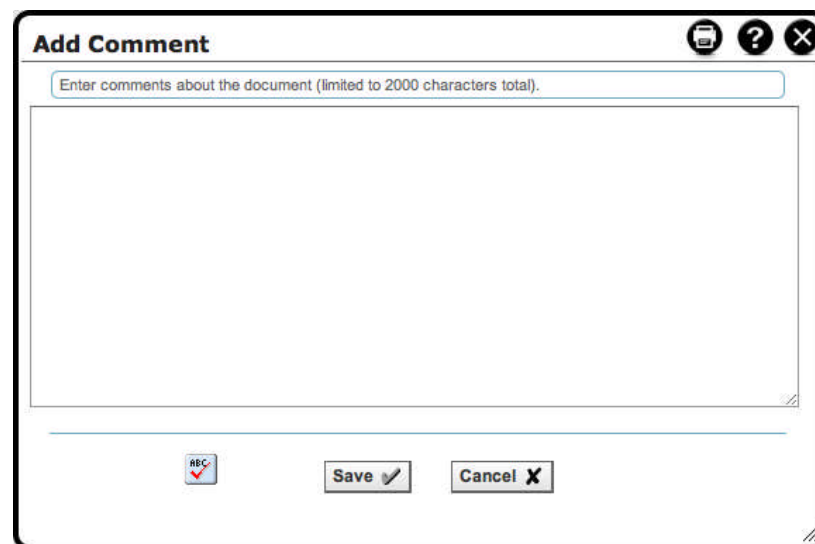


Figure 9.6 – Add a document comment

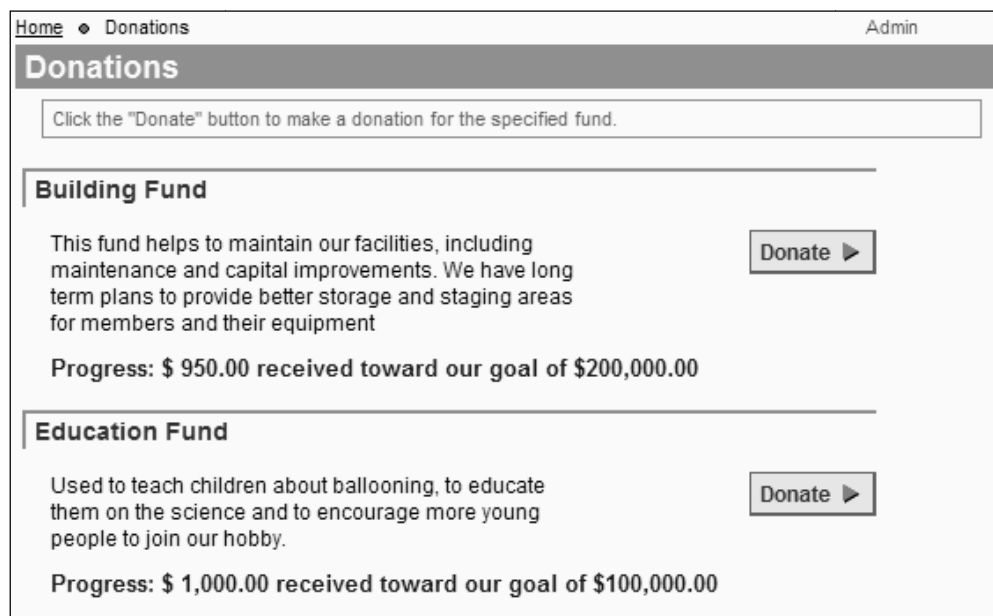
Enter the comment and click the **Save** button to add it to the list, or click **Cancel** to close the dialog without saving.

## Chapter 10 – Donations

### INTRODUCTION

The Donations module allows you to establish funds into which members and non-members can donate. A number of options are provided to control fund visibility, target and whether anonymous donations are allowed. Donations are processed through the same payments processing module that's used for memberships and event registrations.

A typical Donations screen is shown below:



The screenshot shows a web interface for the Donations module. At the top, there is a navigation bar with "Home" and "Donations" links, and an "Admin" link on the right. Below the navigation bar is a header section titled "Donations". Under this header, there is a message box that says "Click the 'Donate' button to make a donation for the specified fund." Below this message box, there are two fund entries. The first entry is titled "Building Fund" and has a description: "This fund helps to maintain our facilities, including maintenance and capital improvements. We have long term plans to provide better storage and staging areas for members and their equipment". To the right of the description is a "Donate" button with a right-pointing arrow. Below the description, it says "Progress: \$ 950.00 received toward our goal of \$200,000.00". The second entry is titled "Education Fund" and has a description: "Used to teach children about ballooning, to educate them on the science and to encourage more young people to join our hobby." To the right of the description is a "Donate" button with a right-pointing arrow. Below the description, it says "Progress: \$ 1,000.00 received toward our goal of \$100,000.00".

Figure 10.1 – Donations screen

Each fund has a title and description plus, optionally, progress towards a target amount. Click the **Donate** button to make a donation. You will see a screen similar to the following:

Home • Donations • Make a Donation

## Donate to Harley Raffle

Enter the amount of the donation and an optional comment. Depending on the configuration, you may also be able to specify if this donation should be reported as anonymous (although the administrator will still know who made the donation.) Click Proceed to Payment to finalize and pay the donation by credit card or by printing an invoice and mailing a check.

Donation \$  ◆

Comment

Do you want this donation to be reported as an anonymous donation? ☐ Yes ☒ No

Figure 10.2 – Making a Donation into a fund

If you are not logged in, the system will display the *non-member* version of this screen, prompting you to enter your contact information. Click the link to log in. If you are logged in, the system already knows who you are.

You will see a simple Donation Amount screen that may have a suggested amount already showing. Some funds also allow the donation to be made anonymously. It will still be visible to club administrators, but they will know that it should be reported to the membership without the donor's name.

Use the Comment field to attach a note to the donation. For example:

*In honor of Jack and Mary Smith, for 10 years of service to the club.*

Click **Proceed to Payment** to complete the Donation by paying via credit card or check.

## Chapter 11 – Events Calendar & Registration

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### ***INTRODUCTION***

The Events Module allows clubs and associations to maintain an online calendar, to inform members and the public of events and to allow them to register for these events. The module fully supports options such as:

- Single-activity or multiple-activity events;
- Notifications (calendar entries that are not full events);
- Public holidays and other significant days listed on the calendar;
- Event categories, including color coding;
- Multiple calendar views with filtering by category and metro area;
- Searching for events based on multiple criteria;
- A link to an external website for an event organized by another group;
- A link to custom pages for additional information on the event;
- A map link for the event location;
- A link to add the event to the personal calendar on your computer;
- Registration required or recommended;
- Limiting events to members only;
- Allowing companions to be signed up;
- Maximum capacity;
- Fees which change after a certain date;
- Fees which are different for non-members and/or companions;
- Payment by credit card or check;
- Event specific questions at multiple levels of the registration;
- Optional event release agreement, including default;
- A special printable version of the month grid with more details.

## VIEWING EVENTS

When users open the events module, the first thing they generally see is the Month Grid view, shown below. (Clubs can configure a different default view on the event calendar admin screen.)



Figure 11.1 – Events – Month Grid View

This view shows a traditional month grid, with events shown on the day scheduled. Today is highlighted in a special color. Links allow users to scroll to the previous or next month.

Events are color-coded based on the event category. Click the **Legend** link to see a list of categories and the color associated with each. Click the red “X” to close this list.

Events that are flagged as Members Only will not be displayed when visitors are viewing the calendar. The grid may also include **Notifications**, which are calendar entries with no details, but which may include a link to an external web site. Finally, the grid may include public holidays and other significant days (e.g. Halloween, Mother’s Day and the solstices/equinoxes.)

The **View:** panel at the top of the screen appears in all views but its contents are different depending on the current view:



Figure 11.2 – View panel in Grid View



- Clicking the  icon displays a search/filter panel. See below for more information.
- Click **Switch to List View** to change view.
- Click **Today** to jump the grid back to the current month.
- Click **Legend** to display a drop-down legend of the color-coding.

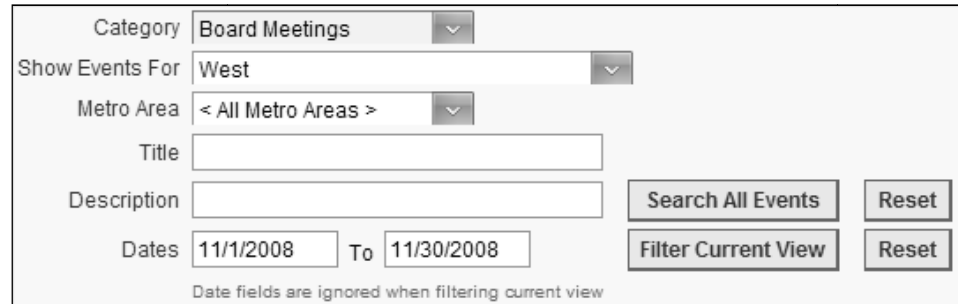


Figure 11.3 – View panel in List View

- Clicking the  icon displays a search/filter panel. See below for more information.
- Click **Switch to Grid View** to change view.
- Click **Month** to see a list of events in the current month. Use the navigation buttons to move forward or backward by a year or month at a time.
- Click **Week** to see a list of events in the current week. Use the navigation buttons to move forward or backward by a week at a time.
- Click **Day** to see a list of today's events. Use the navigation buttons to move to the previous or next day.
- Click **Future** to see all events past today.
- Click **Today** to jump the grid back to the current month.
- Click **Legend** to display a drop-down legend of the color-coding.

## Searching and Filtering

Clicking the  icon displays the following panel:



The panel contains the following fields and buttons:

- Category:** A dropdown menu with "Board Meetings" selected.
- Show Events For:** A dropdown menu with "West" selected.
- Metro Area:** A dropdown menu with "< All Metro Areas >" selected.
- Title:** A text input field.
- Description:** A text input field.
- Dates:** Two date input fields. The first contains "11/1/2008" and the second contains "11/30/2008", separated by a "To" label.
- Buttons:**
  - Search All Events:** A button to search through all events.
  - Filter Current View:** A button to filter the current view.
  - Reset:** Two buttons, one next to "Search All Events" and one next to "Filter Current View", to clear the criteria.

Date fields are ignored when filtering current view


Figure 11.4 – Search / Filter panel for events

Using this panel, you can filter the current view to show only events that match your specified criteria. Select a category, subgroup (chapter, district or region) or metro area, or enter part of the title or event description. Click **Filter Current View** to retain the current view but only show events that match your criteria. Click the matching **Reset** button to clear your criteria. When you click **Filter Current View**, any values in the Dates fields are ignored because the view itself controls which dates are visible.

Using this panel, you can also search through all events to show events that match your specified criteria. When you click **Search All Events**, the system switches to a Search Results panel which is similar to a List View and which shows all events that match your specified criteria. Click the matching **Reset** button to clear your criteria.

When you search using the Title and Description fields, there is no need to type wildcards; the system will find the specified string wherever it appears.

The Metro Area option will only be displayed if you have defined metro areas (on the Control Panel.)

Click the  icon to hide this panel.

## Event Details

To view the details for an event, click the event title in the current view. You will see a display similar to the following:

Home • [Events Calendar](#) • Summer Picnic

### Events Calendar - Event View

This is the "Event Detail" view, showing all available information for this event. If the event has passed, click the "Event Report" button to read a report and view photos that were uploaded.

[Return to Grid View](#) [Today](#)

#### Summer Picnic

When: Saturday, Jun 30, 2007, 10:00 AM to 5:00 PM  
 Where: County Forest Preserve  
 543 Higgins Ave  
 Schaumburg, IL

MAPQUEST

[Registrants](#)

Contact: Lisa G Abrams  
 Email [leebie@verizon.net](mailto:leebie@verizon.net)

Registration: Required  
 Payment: Payment In Advance Only

Registrants & Fees:

Registrant	Fee
Companions Only	\$ 20.00
Member	\$ 10.00
Non-Member	\$ 10.00
Non-Members & Companions	\$ 10.00

Join us for a fun time in the sun and water. We'll have BBQ food, beer and soft drinks, games, swimming and lots of space to spread out and enjoy the season.

[Don't forget the sunscreen!](#)

Figure 11.5 – Events – Event View

This view shows the event title, location, description and rules (registration, attendance and fee, if any.) If the event is in the future and registration is required or recommended, the **Register Now** button allows users to begin the registration process.

If the **Mapquest** feature was enabled for the event, clicking the Mapquest icon opens a new window showing the event's location in Mapquest (where attendees can also get directions to the event location.)

Note that the **Register Now** button will not appear if registration is not required, or if the event is for members only and the current user is not logged in, or if the event has completely passed (unless you are an admin), or if registration is closed for some other reason. For a multi-day, multi-activity event, the button will appear until the last day of the event, to allow people to register for individual activities on the last day.

If the **Registrants** button is displayed, you can click it to see a list of who else is coming. For members, you can then click their **Bio** link to jump to each member's Bio / Directory page.

### vCalendar Icon



What is this?

The calendar icon below the Register Now button allows you to add the event to your personal calendar. This feature uses an Internet standard called a "vCalendar" file which is supported by most Personal Information Manager (PIM) programs, including Outlook, Eudora, Mozilla Thunderbird, Palm Desktop, Appleworks, Entourage, etc. When you click the icon, a standard dialog will be shown, asking if you want to Open or Save the file. Clicking Open creates a new appointment/meeting in your PIM calendar. You can also Save the file then share it with others. It can be opened at any time to create the appointment/meeting.

The vCalendar icon is also displayed beside each event in the various List views, allowing you to quickly add multiple events to your PIM calendar.

If the event has passed, the **Event Report** button displays a ClubExpress custom page with a report on what happened. You can also link a ClubExpress photo page to the **Event Photos** button.

## Multi-Activity Events

If the event has multiple activities, these are listed below the general event description, as shown in the following screen:

<b>Activities</b>		
<b>Registration</b>		
When: Friday, Oct 21, 2005, 8:00 AM to 10:00 AM		
Where: Gunderson Ranch Flagstaff, AZ		
Registration: Required		
Registrants & Fees:	<b>Registrant</b>	<b>Fee</b>
	Companion	\$ 1,200.00
	Member	\$ 1,200.00
		<b>Fee After 10/1/2005</b>
		\$ 1,500.00
		\$ 1,500.00
<b>BBQ and Dancing</b>		
Details: Roasted calf and pig round out the day for tired and happy balloonists and their families. Join us for a fun filled evening with friends from around the country. Music provided by the Hi-Flyin Fiddlers, plus games for the kids.		
When: Saturday, Oct 22, 2005, 7:00 PM to 11:00 PM		
Where: Rear Lawn of the main house - Gunderson Ranch Flagstaff, AZ		
Registration: Required		
Registrants & Fees:	<b>Registrant</b>	<b>Fee</b>
	Companion	\$ 50.00
	Member	\$ 40.00
		<b>Fee After 10/1/2005</b>
		\$ 60.00
		\$ 50.00
<b>Technical 1 - New techniques in Control</b>		
Details: Reknowned international balloonist, Stephan Lundqvist will present a lecture on the new control architecture developed in Sweden, that's sweeping the community. After the session, his balloon will be available for review		

Figure 11.6 – Events – Event Activities

## EVENT REGISTRATION

To register for an event, click the **Register Now** button. If the event is configured to handle registrations using a different web site, a new window will open showing the configured site and page. If the event is configured to handle registration on ClubExpress, a page similar to the following will be shown:

(If you have already registered for this event, a warning message will be displayed, but the system will not stop you from registering again.)

Home • Events Calendar • Ballooning Fun • Registration

### Event Registration - Personal Information

To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step.

Event: Ballooning Fun  
 When: Tuesday, April 08, 2008, 8:00 AM - 5:00 PM  
 Where: Jackson Farm  
 RR4  
 Newport, IL  
 Payment: Payment In Advance Or At Event

**Primary Registrant**

Select Registration Type

Figure 11.7 – Event Registration Wizard – Signing Up

### Primary Registrant

If you have not logged in, you will see the *non-member* version of this page, where non-members enter their contact information. Click the link to login so that you can register as a member.

If you are already logged in, the system knows who you are so all you need to do is select the appropriate registration type, then click **Next**.

If you are an administrator or coordinator of events, you will see additional options. Consult the administrator manual for instructions.

## Companions

If the event allows companions to be signed up, a second section is displayed on the page, as shown on the figure below.

### Companions/Guests

Add the names of the companions (if any) who will be attending the event with you by clicking the 'Add Companions/Guests' button. *Note: If nothing happens when you click the button, your popup blocker may be preventing the page from appearing. Click 'Edit' to change information for a specific companion; click "Remove" to remove a companion previously added.*

First Name  [Edit](#) [Remove](#)

Last Name

Reg. Type

Title

Company

Address 1

Address 2

City

State

Zip

Country

Email

Phone

Figure 11.8a – Event Registration Wizard – Entering Companions

This section allows users to enter companions and to specify a registrant type for each of them. Selected fields may be required, depending on how the event is configured. Click the **Add Companion/Guest** button to display a popup screen for another companion, as shown on the next page.

Click the **Edit** link to modify a companion already entered or the **Remove** link to remove a companion previously entered, or to re-enter a companion if you made a mistake.

**Add Companion/Guest**

Add or edit companion information. Fill in the information, and select the registrant type. Click the "Save" button when finished.

First Name

Last Name

Reg. Type

**Add Companion/Guest**

Add or edit companion information. Fill in the information, and select the registrant type. Click the "Save" button when finished.

First Name

Last Name

Reg. Type

Title

Company

Address 1

Address 2

City

State

Zip

Country  [Show All Countries](#)

Email

Phone

Figure 11.8b – Two versions of the Add Companion/Guest Dialog

Click the **Add Other Members in Membership** button to add the members of your family or company. You will see a screen similar to the following:

**Add Other Members in Membership**

Select the registrant type for individuals who are attending this event. Select 'Not Attending or Already Registered' if the person is not attending. To change the registrant type for everyone, make a selection in the Default Registrant Type.

Default Registrant Type

**Primary Member**

Martin Smith Primary Registrant

**Family Members**

Juan Ramos

Bobbi smith

Mary Smith

**Associate Members**

Bobby Smith

Figure 11.9 – Event Registration Wizard – Adding Additional Members

Select a default registration type and each secondary or tertiary member will be registered with this type. You can also change the type or “unregister” individual members by selecting the appropriate option. Click **Save** and these members are added en masse to the companions panel, or click **Cancel** to close the form without adding anyone.

When all information has been entered, click the **Next** button to move to the next screen. If either the First Name or Last Name companion fields have values (and you forgot to click the **Add** button) a warning message is displayed.

What you see next will depend on whether the event as defined has just a single activity or multiple activities, whether a release agreement must also be signed and whether there are event-specific questions.

### Single Activity Event – No Release Agreement – No Questions

For a single activity event with no release agreement and no event-specific questions, the summary page is immediately displayed. If the event has fees, the system knows how much should be paid based on the registrant and companion types already specified. And if there is no fee, the summary page will confirm this fact.

[Home](#) ♦ [Events](#) ♦ [Around the World in a Balloon](#) ♦ Registration

## Event Registration - Summary

Review the registration info shown below.

### Event Information

Event: Around the World in a Balloon  
 When: Wednesday, October 05, 2005, 10:00 AM - 2:00 PM  
 Where: Kahn Auditorium  
 123 Main St.  
 Rolling Meadows, IL

### Registrant Information

Primary Registrant: Martin Smith

### Activity/Item Information

Activity/Item	Registrant/Fees
<b>Around the World in a Balloon</b> When: Saturday, Jun 5, 2004, 10:00 AM to 2:00 PM Where: Kahn Auditorium 123 Main St. Rolling Meadows, IL	Martin Smith \$ 15.00
<b>Total: \$15.00</b>	

### Payment Information

You may pay for this registration in advance or at the door. Please make your selection below, and click the "Complete Registration" button to reserve your place. If you elect to pay in advance, you will see the payment page where you can pay with a credit card online, or print an invoice and pay with a check.

☒ Pay in advance
 ☐ Pay at door

◀ Back

Cancel X

Complete Registration ⚡

Print Summary

Figure 11.10 – Event Registration Wizard – Summary

At this point, users can still click the **Back** button to return to a previous step, or the **Cancel** button to cancel the registration process.

The system knows if payment is required in advance, or if payment must be made at the event, or if either option is allowed. In the above example, clicking **Complete Registration** will take users to the payment module to complete payment. Users will receive a confirmation email for the registration and another when the fee is paid. A registration is not saved until one of these buttons has been clicked.

## Single Activity Event – Event-Specific Questions

If the event has event-specific questions, a page similar to the following is shown:

[Home](#) ♦ [Events](#) ♦ [Test Multi-Activity Event](#) ♦ [Registration](#)

### Event Registration - Additional Information

Event: Test Multi-Activity Event  
 When: Wednesday, May 10, 2006 - Thursday, May 11, 2006  
 Where: Manny's Restaurant  
 5005 Newport Drive  
 Rolling Meadows, IL  
 Payment: Payment In Advance Only

#### Registration Questions

Pace Group

#### Questions for Barbara Smith

What is the highest level of certification you have achieved?

In what year did you achieve this certification?

#### Questions for Martin Smith

What is the highest level of certification you have achieved?

In what year did you achieve this certification?

#### Questions for T-Shirt

**Martin Smith**  
 \* What T-Shirt size do you want?

**Barbara Smith**  
 \* What T-Shirt size do you want?

Figure 11.11 – Event Registration Wizard – Event-Specific Questions

Questions can be defined at any of three levels:

- For the registration as a whole;
- For each registrant including companions with the registration;
- For each registrant signed up for a specific activity (this option is only shown for multi-activity events.)

Answers may be required in different formats, including text, number, date or date part, Yes/No or a selection list. Some answers may be required while others

are optional. When you have answered the questions, click **Next** to proceed to the next screen.

### Single Activity Event – Release Agreement

For a single activity event with a release agreement, this page is displayed before the summary page. Click the **I agree** checkbox to signify acceptance of the agreement and then click the **Next** button to display the summary page above.

If the event has both questions and a release agreement, the questions page will be displayed first, then the release agreement page.

### Multiple Activity Events

After the initial registrant information page, the user is taken to a page similar to the following, which lists the individual activities for the event and allows separate registration for each activity.

Activities for Martin Smith	
Activity/Item	
<b>NCATA Conference T-Shirt</b> Registration: Required	<input checked="" type="checkbox"/> \$ 10.00
<b>NCLB Update</b> When: Monday, Oct 29, 2007, 12:00 AM to 1:00 PM Where: Same as event Registration: Required	<input checked="" type="checkbox"/> \$ 40.00
<b>Lunch</b> Details: lunch with guest speaker When: Monday, Oct 29, 2007, 12:00 PM to 1:00 PM Where: Same as event Registration: Required	<input type="checkbox"/> \$ 0.00
<b>Registrant Total: \$50.00</b>	
<b>Registration Total: \$50.00</b>	
<input type="button" value="◀ Back"/> <input type="button" value="Cancel X"/> <input type="button" value="Next ▶"/>	

Figure 11.12 – Event Registration Wizard – Event Activities

This wizard page will be displayed once for each person who is part of the registration, first the primary registrant and then each of his or her companions in turn. Only activities that each individual user or companion can sign up for will be shown on each iteration of the wizard page. Registration is a simple matter of checking the box to indicate that the current person will attend that activity or purchase that item. If an activity fills up while someone is registering their party, it will not be shown on subsequent iterations of this screen. Users can move

forward or backward through the wizard to ensure that the most appropriate people in the party are signed up for each activity.

The event activities page keeps a running total of registered activities. When users finish registering for individual activities, they click the **Next** button to proceed to the next page. If event-specific questions are defined, this screen will be displayed next. If a release agreement is required, this page is displayed next. If neither is required, the summary page shown above is immediately displayed.

## Payment

For events with a fee, clicking the **Complete Registration** button displays a screen similar to the following.

Home • Control Panel • Pending Payments • Make Payment

### Make Payment

The list below shows outstanding payments due. Use the checkboxes to select which payments you wish to make. Then, make a choice in the "Select Payment Method" dropdown list. If you elect to pay by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for your transaction to complete.

If you prefer to pay by check, select the "Print Invoice and Send Check" option and press the button with the same name. A printable version of the page will be displayed which includes instructions on how to make out your check and where to mail it.

Fields marked \* require an entry. Click to change amount.

<input checked="" type="checkbox"/>	<b>Event Registration</b> (2/12/2007)	Due \$ 15.00	Pay \$ 15.00
	7/30/2007 - Season Opening Party		
	ray novak - Season Opening Party	15.00	
	Transaction Total:		15.00

**Total Selected For Payment** **\$ 15.00**

Select Payment Method < Select Payment Method >

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

**Refund Policy:** The refund policy is set by Northwestern Balloon Club. Refund requests must be directed to Northwestern Balloon Club - they cannot be handled by ClubExpress.

**Cancel**

Figure 11.13 – Pending Payments

This screen will show the final payment for the event, including the details of each line item (registrant, companion(s) and activities. If you have other pending payments, such as a membership renewal or registration for another event, these will also be listed and you can pay for them all with one transaction.

Select the payment type and enter any additional information that's required. For a credit card payment, this is your credit card information. For a check payment,

a print function is available to generate an invoice for mailing with the check. Administrators have access to additional payment options (credit card outside ClubExpress, cash, complimentary, etc.)

The system maintains a Payment Status flag for event registrations. If users choose to pay by check, their registration is stored in the database but it's not confirmed until the check is received (and may be deleted by an event coordinator if there is a capacity limit and others are willing to pay immediately.)

## Partial Payments

Some events may be configured to allow partial payments. For example, a ski club may organize a multi-day trip to a distant ski resort, and members will have the option of making progress payments until the total has been paid.



If you see a pencil icon beside the event total and you wish to pay less than the full amount, click it. The amount to be paid will change to a text box allowing you to edit this amount. The system may suggest a recommended amount and it will enforce a minimum payment. Press *[Tab]* to move off the field and post your change; the total selected for payment will be updated.

If you make a partial payment against an event, the event transaction stays on your payment screen, with the amount due now reflecting the partial payments made to date. Your **Profile – Transaction History** screen reflects the original amount of the transaction, payments made to date, and the amount owing.

The Payment Status for an event that's paid in full will be "Paid in Full". For an event that's partially paid, the status will be "Partially Paid".

## Chapter 12 – FAQ (Frequently Asked Questions)

### INTRODUCTION

FAQ stands for “Frequently Asked Questions”. This module is used to create custom pages of questions and answers, organized into topics. It might also be called the “Technical Library” module because of its ability to create a library of documents on technical subjects.

For example, a vintage car club might have a library of how-to articles written by members on various aspects of restoration, while a sailing club has similar articles on equipment, racing techniques, safety issues and certifications.

The FAQ module uses the advanced Content Editor to create pages of any length, with complete control over fonts, alignment, colors, embedded images, links and other complex formatting.

A typical FAQ category screen is shown below.

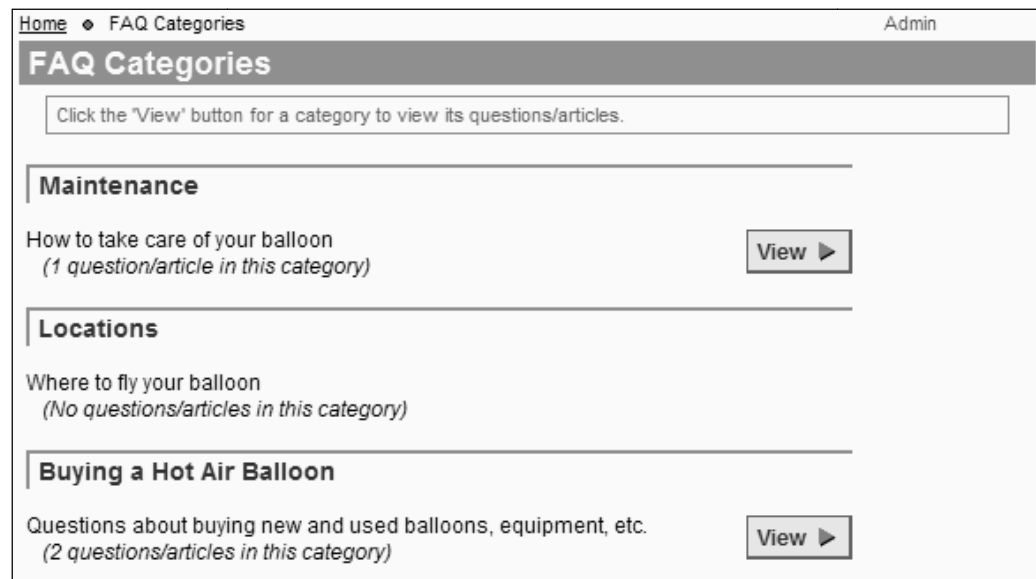


Figure 12.1 – FAQ Category screen

Click the **View** link to view the questions within a category. A screen similar to the following will be displayed.

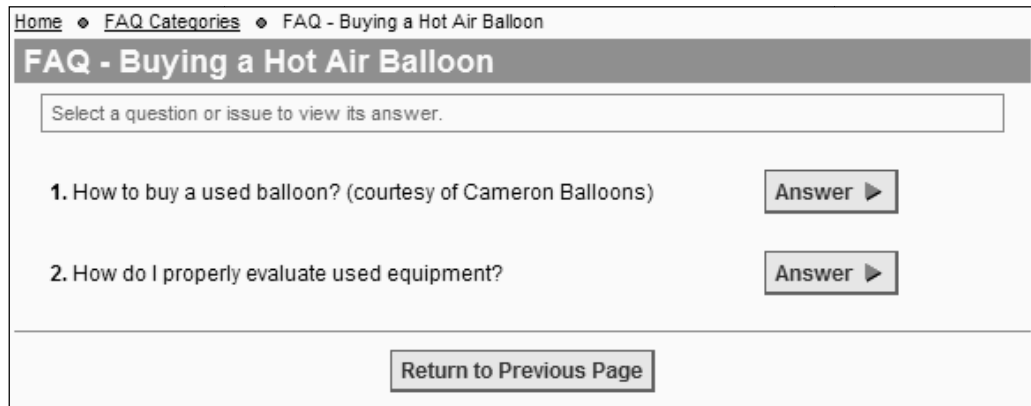


Figure 12.2 – FAQ Questions screen

Click the **Answer** link to view the answer to a specific question. A screen similar to the following will be displayed.

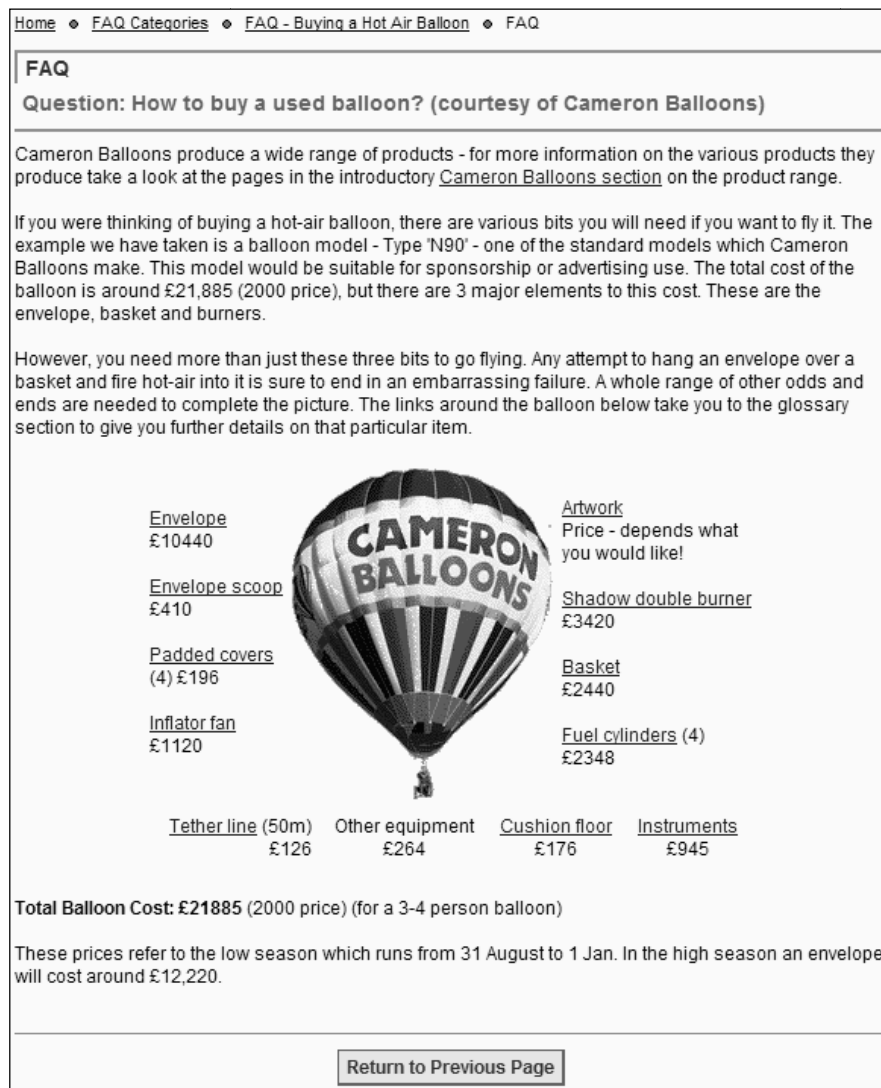
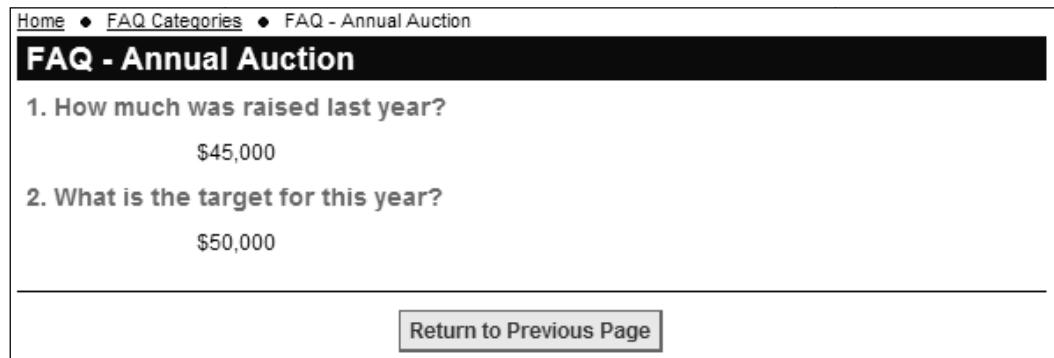


Figure 12.3 – FAQ Answer

When answers are relatively short, questions and answers may be shown on the same page. The resulting screen looks similar to the following:



The screenshot shows a web interface for 'FAQ - Annual Auction'. At the top, there is a breadcrumb trail: 'Home • FAQ Categories • FAQ - Annual Auction'. Below this is a black header bar with the text 'FAQ - Annual Auction' in white. The main content area contains two questions and their answers. The first question is '1. How much was raised last year?' with the answer '\$45,000'. The second question is '2. What is the target for this year?' with the answer '\$50,000'. At the bottom of the screen, there is a button labeled 'Return to Previous Page'.

FAQ - Annual Auction	
1. How much was raised last year?	\$45,000
2. What is the target for this year?	\$50,000
<a href="#">Return to Previous Page</a>	

Figure 12.4 – FAQ Questions and Answers on the same screen

Press **Return to Previous Screen** to move back up through the sequence of screens.

## Chapter 13 – Interests

The Interests module allows a club or association to list and describe various special interests, programs or affiliations that the organization sponsors. Interests are grouped into categories that each group also defines. Members can then register for an interest, either from the Interest pages or from their individual Profile screens.

If the interests are based on things that members like to do, they provide a way for people with similar experiences and desires to meet up with each other and share experiences. If the interests are based on organization activities and programming, they provide a ready group of participants and volunteers to ensure the success of an endeavor.

When the Interests module is enabled, and a user clicks the menu choice, a screen like the following is displayed:

Home • Interests Admin

### Interests

This is a list of interest categories and the interests within each category. Click on an interest to learn more about that item. If you are logged in, you will also see the members who have declared that interest, with a link to their member directory entry.

---

**Maintenance** Everyone

Maintaining and preparing balloons and associated equipment for the flying season

<a href="#">Burners</a>	Members: 2	Coordinator: <a href="#">Jon Harrison</a>
<i>Maintaining the gas burners, including storage tanks, pipes, jets, controls, gauges and other equipment</i>		
<a href="#">Envelope</a>	Members: 1	
<i>Maintaining and repairing the balloon envelope, including vents, lines and control surfaces</i>		
<a href="#">Baskets</a>	Members: 1	
<i>Maintaining baskets, including lines, safety harnesses, weights and other passenger elements</i>		
<a href="#">Support Equipment</a>	Members: 2	
<i>Everything but the basket, burner or envelope</i>		

---

**Competition** Everyone

Sweep Rowing

<a href="#">Balloon races</a>	Members: 2
<i>We're interested in every aspect of balloon racing. We love to race and improve our skill at reading the weather, winds and terrain. We also foster competition with other clubs.</i>	

Figure 13.1 – Interests

This screen lists each interest category in the display sequence specified, with its description. Within each category are its interests, together with the Interest Coordinator and the number of members who have registered for that Interest.

Each interest on this screen is a link that will display the members who have registered for the interest. However, this list is available to members only. If the

current user is logged in, the following screen will be displayed. If you are not logged in, the Login screen will first be displayed. Visitors will then click their back button to return to the previous screen while members will log in to view the screen above.

Home • Control Panel • Interests • Details and Members

## 1 to 3 years

This screen lists the members who have signed up for the interest. Click the member's name to view his or her directory entry (if available). Click "Sign Me Up" to add yourself to the list, or "Remove Me" to remove yourself from the list.

[Sign Me Up](#)

### Members

Name	City	State	E-Mail Address
Bernadette Peters	Chicago	IL	

[Return to Previous Page](#)

Figure 13.2 – Interest Members

This screen shows the members who have registered for the Interest. Each member is shown with his or her name, city, state and email address. The name is a link that will display that member's Directory entry.

If you are not on the list, the **Sign Me Up** button at the top allows you to join the Interest list. If you are already on the list, the **Remove Me** button at the top allows you to leave the Interest list. Note that the **Sign Me Up** button will not appear if your club or association has set a maximum number of interests that you can sign up for within a category and if you have reached this maximum.

You can also specify your Interests using the **Profile – Interests** screen.

## Chapter 14 – Membership Directory

### INTRODUCTION

ClubExpress provides an online member directory, allowing you to locate and contact other members. This module is usually placed on the members-only side of the web site, so that confidential and personal information is only made available to organization members.

Selecting this choice from the menu displays a screen similar to the following:

Home • Membership Directory

### Membership Directory

The Member Directory allows you to view other members. (Note that your own directory information can be updated by clicking the Profile link.) Begin by specifying a search value and clicking the "Search" button. The system will display matching members. If no search value is specified, all members will be displayed. If there are more than 30 matching items, use the Paging controls to see additional pages. Click "View" to see the bio for that member. (If there is no link by the member's name, that member has chosen not to display a bio. Note that members can also choose to completely remove their names from this list.)

#### Search For Members

Search By ☒ Last Name ☐ First Name ☐ City ☐ State/Province ☐ Country  
☐ Zip ☐ Company ☐ Interests ☐ Recent Member ☐ Organizational Tree

Search For

Search Results (3 members found)  Page 1 of 1

Name	Company	City	State	Zip	Bio
Jessica Smith		Chicago	IL	60601	
John Smith	None	Chicago	IL	60601	
Martin D Smith	Verizon	Chicago	IL	60601	<input type="button" value="View"/>

Figure 14.1 – Member Directory List

To find a member, select the field to search on, then enter a value and click **Search**. The list of matching members will be displayed under the Current Membership heading, sorted by the search field. Use the **Recent Member** Option to find members who have joined in the past 10, 30, 60 or 90 days. If no search value is entered, clicking **Search** displays the whole membership.

Members are displayed in pages of 30 members at a time. Click the **Prev** and **Next** buttons or the drop-down list to select a specific page. To view the membership directory entry for a member, click the **View** button. A screen similar to the following will be displayed:

[Home](#) • [Membership Directory](#) • [Martin D Smith](#)


---

## Membership Directory

---

**Martin D Smith** (smithy) Edit

---








Company

---

Edit

*I've been a ballooning fan ever since I saw my first hot air balloon floating over the campground on my summer family vacation when I was 6 years old. One of my best memories was of another summer vacation a few years later in Arizona, when my dad and I rode on a hot air balloon.*

 What is this?

I joined the club 15 years ago at age 25, serving as crew and line holder for other members. In my early 30's I bought an old balloon and spent the winter stripwhy is this here?ping it down and reconditioning everything. The next summer was my first flying my own rig. My newest balloon is only three years old, bright green with yellow stripes.

In addition to all this, we now have the ability to upload information such as documents, JPG files, and others. This will really assist me in getting the site up to date and keeping it there. Hopefully the club members will feel the same.

---

Email Address [support@clubexpress.com](mailto:support@clubexpress.com)

---

Office Phone 866-457-2582  
Fax 847-255-0273

---

Company Address 5005 Newport Drive  
Suite 203  
Rolling Meadows, IL 60009

---

Edit

---

Years Flying 12

---

Chapters Chicago

---

[Return to Previous Page](#)

Figure 14.2 – Member Directory Detail

The information shown on this screen will vary based on the Visibility level chosen by the member. Individual members who have specified not to be listed in the directory will not be shown.

There are two versions of this screen, one for clubs where members join as part of their personal lives and one where members join as part of their business or professional lives.

## vCard Link



What is this?

Below the member's photo is an icon which allows you to add this person to the personal address book on your computer. This feature uses an Internet standard called a "vCard" file which is supported by most Personal Information Manager (PIM) programs, including Outlook, Eudora, Mozilla Thunderbird, Palm Desktop, Appleworks, Entourage, etc. When you click the icon, a standard dialog will be shown, asking if you want to Open or Save the file. Clicking Open creates a new contact record. You can also save the file to your local hard disk and share it with others, or open it at any time to create the contact record.

This feature is sensitive to the visibility settings chosen by the member; it will only include contact information that the member has chosen to show.

## Social Networking Links

If the club has enabled social networking links, and the member has configured their profile information for any of these links, the appropriate logos will be displayed under the vCard link. Click a logo and a new window will open with that member's public profile on the appropriate service.

## Photo Albums

If the club has enabled member-level photo albums, the system will place links to these photo albums under the social networking links. Click an album name to view it.

## Blogs

If the member authors one or more blogs on the club's website, you will also see links for each blog.

## Edit Links

When you view your own directory entry, small **Edit** links are placed in each section of the bio. Clicking one of these links displays the appropriate page from your Profile, allowing immediate changes to be made and saved to the directory entry. You can also click the photo itself to jump to the page that allows you to edit the photo.

Click **Return to Previous Page** to go back to the listing screen.

## Chapter 15 – News

The News module is used for announcements and other information that should be communicated to members and visitors. News items can be entered with an active date (when the item will appear) and an expiration date (when the item will no longer be displayed.) Each item includes a heading, summary and detailed news release or report, which can include any HTML formatting and even images.

A typical news screen is shown below:

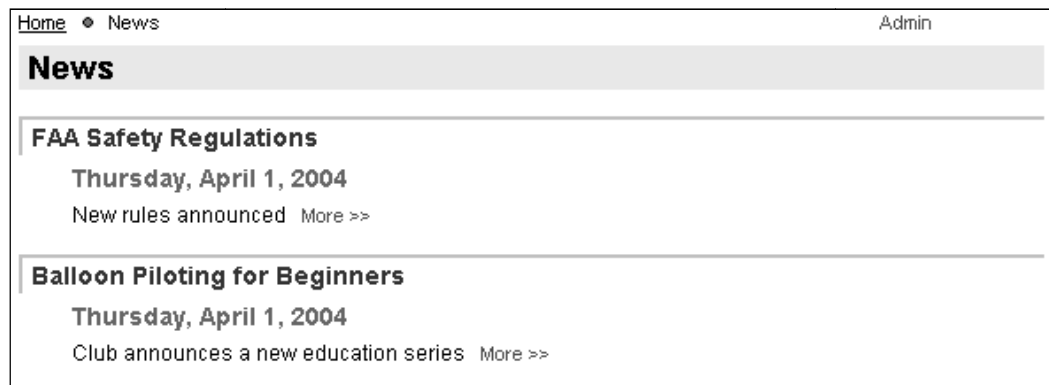


Figure 15.1 – News main screen

Each item is shown with a heading, the date of posting and a summary. Clicking the More>> link displays the complete news item, as shown in the following example:



Figure 15.2 – News item screen

Click **Return to Previous Page** to return to the main News screen.

## Chapter 16 – Photo Albums

### INTRODUCTION

ClubExpress supports custom photo albums containing photos uploaded by administrators or individual members. Each photo is stored in multiple resolutions with a title, caption, photographer's name, the date the picture was taken, and one or more tags describing the photo.

Photo albums are organized into categories that can be anything you want, as general as "Events" or as specific as "Summer Picnic 2012". Individual photo albums can be placed on the menu.

### PHOTO ALBUM INDEX

ClubExpress also includes a Photo Album Index function that collects all defined photo albums onto a single screen. This function can easily be placed on the menu as a single entry point into your organization's photos. Clicking the Photo Album Index link displays a screen similar to the following:

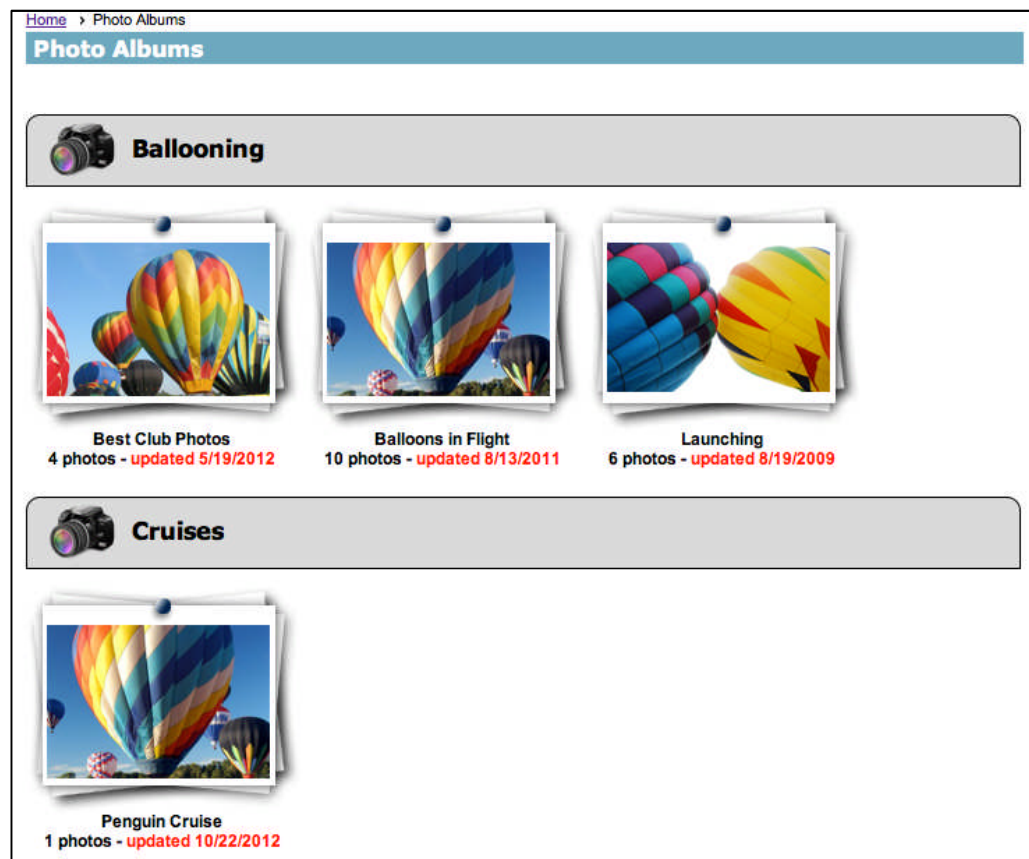


Figure 16.1 – Photo Album Index



The initial view shows the 30 newest and most recently changed photo pages. When you first visit the page in a session, the **Search Tools** panel will appear. On subsequent visits, click the “magnifying glass” icon the Page Tools Widget to re-display this panel. You will see the following drop-down:

Figure 16.2 – Photo Album Search Tools

Select one of the radio buttons. If appropriate, a text box or drop-down selector will appear at the bottom to enter or select the filter value. Click the **Search** button to apply your search. Note that the Album Title, Photographer Name, Photo Tag, and Member Name options will find the specified text *anywhere* in the field.

Search results are displayed 30 albums at a time and grouped by category, with paging controls to move through each page. Within each category, albums can be displayed in alphabetical order or in descending order by when the album was last updated. Member photo albums comprise their own category that can be placed at the beginning or end of the list.

For each album, the system will display the album title, number of photos, and when the album was last updated.

Click the photo to display the album. You will see a popup window similar to the following:

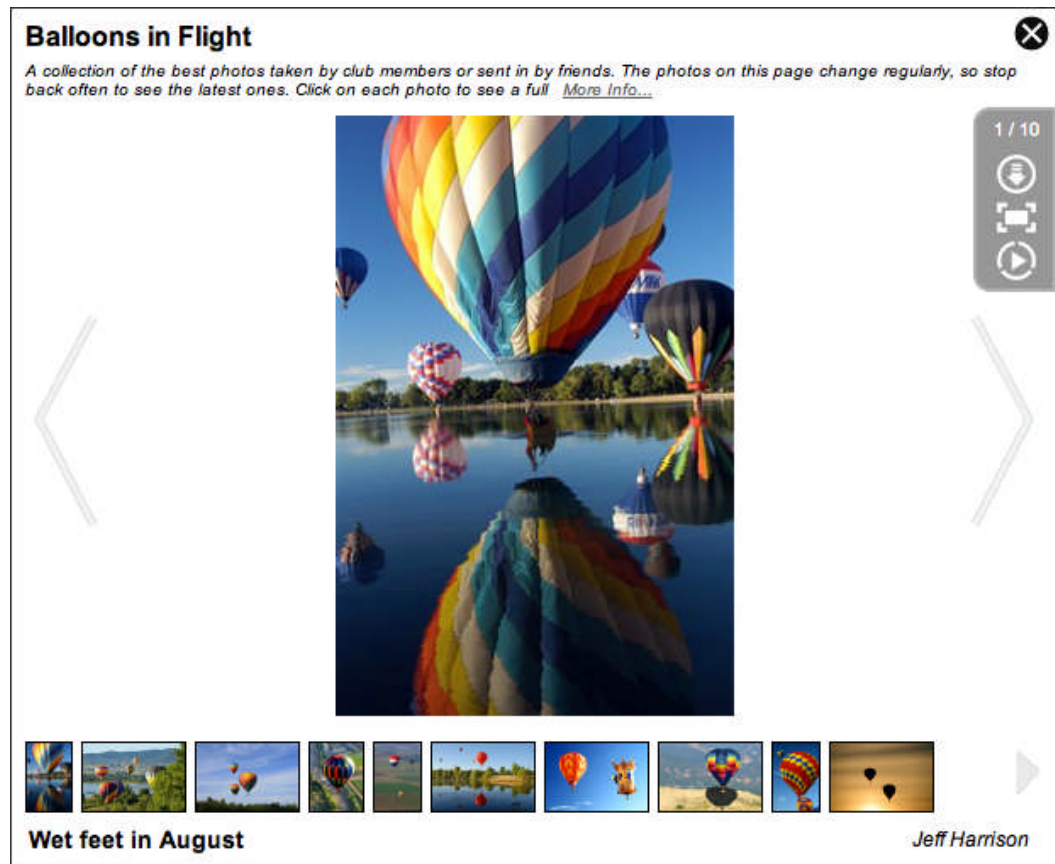


Figure 16.3 – A Typical Photo Album

The photo album title and description are displayed at the top. For longer descriptions, click the [More Info...](#) prompt.

The photo itself is displayed in the middle, with navigation arrows on the left and right. Thumbnails of each photo in the album are displayed along the bottom. Click the navigation arrows to move to the previous or next photo, or a thumbnail to select a specific photo. If there are more photos in the album than can be displayed across the width, the thumbnail section will have its own navigation arrows.

The photo title, photographer and caption are displayed at the bottom.



The gray tab in the top right corner shows the current photo number and total, then three icons:

- Download hi-res
- Full-screen view
- Play/Pause slideshow mode

To close the album, click the **X** icon in the top right corner.

## Chapter 17 – Storefront

---

### ***INTRODUCTION***

The ClubExpress Storefront is a powerful E-Commerce module which allows you to purchase club and association merchandise through the website. The module includes the following features:

- Featured products, Specials, Search by category;
- Display product title, photo, description, variations;
- Display appropriate prices based on whether the user is logged in;
- Add to shopping cart;
- View shopping cart, adjust quantities, remove product;
- Checkout process;
- Gift option;
- Shipping address and shipping method options;
- Full integration with ClubExpress payment page;
- For digital content, a “digital bank” to download paid products.

---

### ***VIEWING AND PURCHASING PRODUCTS***

When users open the storefront, they will see a screen similar to the following:

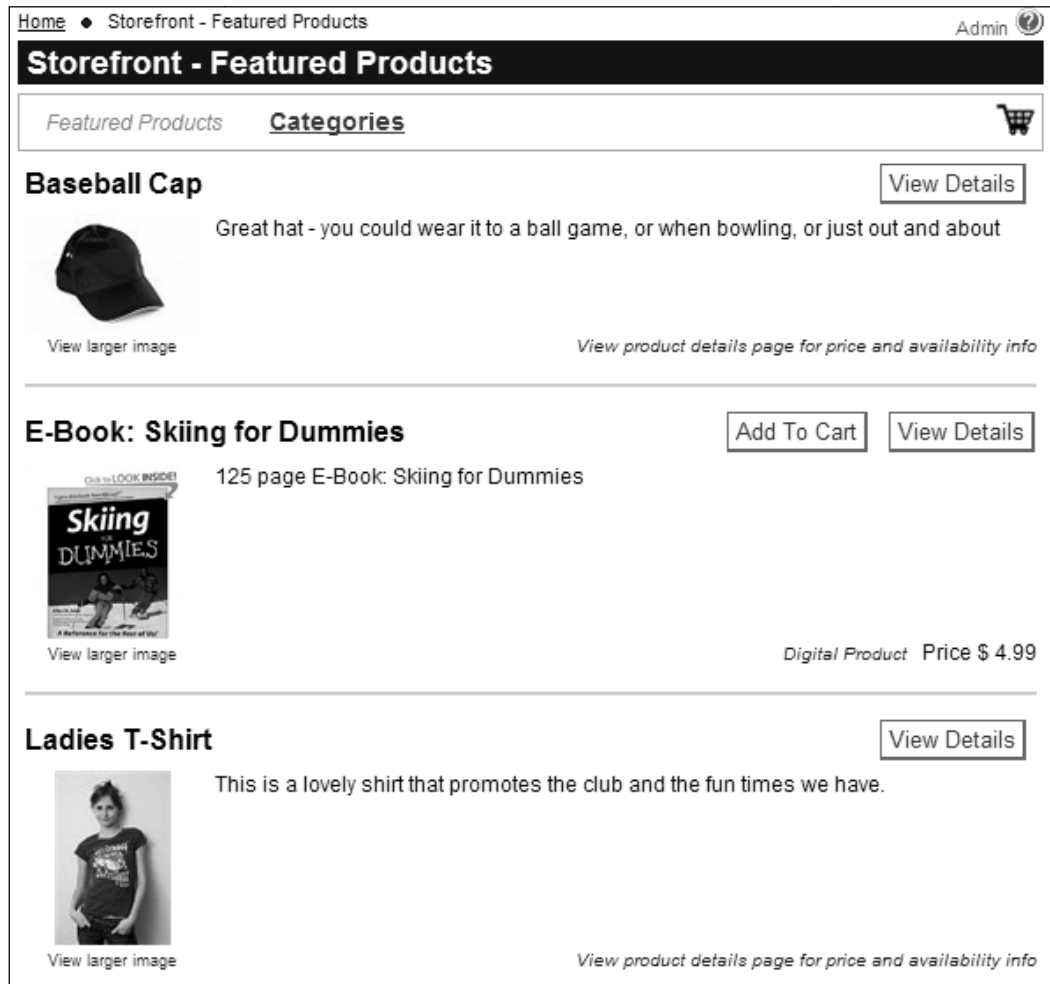


Figure 17.1 – Storefront opening screen

A full storefront displays featured products, specials and categories, although the initial opening screen may be different for your club or association. There is also a “limited” storefront option that just shows a list of products with a separate list of specials.

Each product includes a title, photo, short description and price or price range if the product has variations. Note that prices may be different for members and non-members; members must login to receive member pricing. Click the **View Details** button to display more information about the product, including product variations (for example, clothing in different sizes and/or colors.)

If the product has no variations, click the **Add to Cart** button.

The Categories list has a slightly different format, shown below.

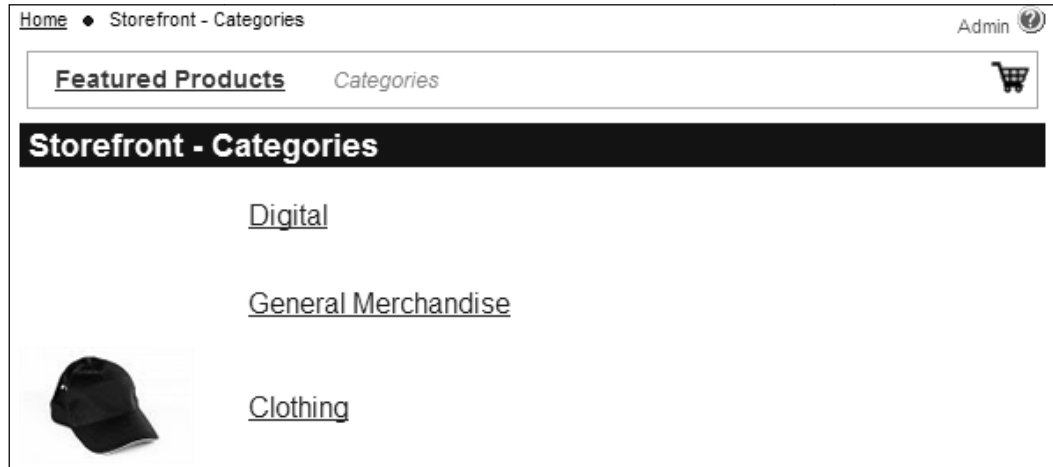


Figure 17.2 – Storefront Categories

Select a category to see a list of products in that category.

### Product Details

When you click the **View Details** button, you will see a screen similar to the following:

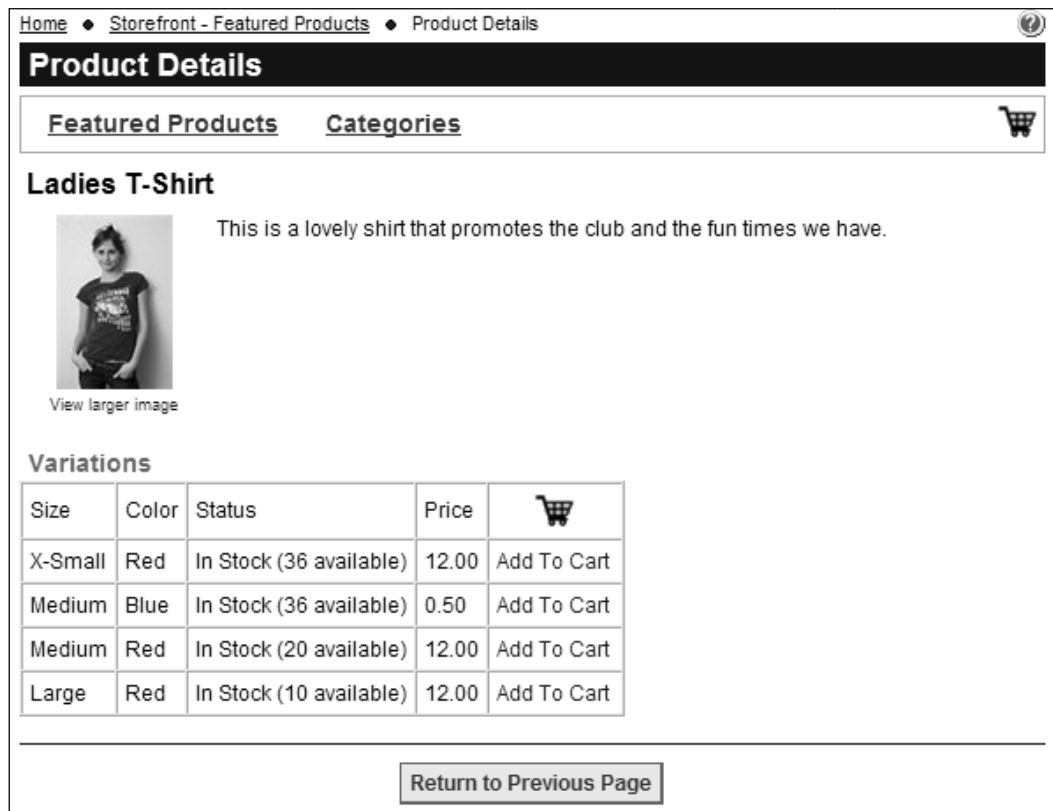


Figure 17.3 – Product Details

This screen shows the product title, photo and a full description. The pricing panel is different based on the type of product and whether it has variations.

- For a product with no variations or for a digital product that is downloaded rather than shipped, the price only is shown.
- For a product with size variations only, or color variations only, or both size and color, or other types of variations, the grid shows all possible configurations that have been configured and the option to order a specific variation.

Note that prices may be different for members and non-members; members must login to receive member pricing.

When you click the **Add to Cart** button, the selected product is added to your shopping cart and the cart is displayed.



## Shopping Cart

Click the shopping cart icon to view your cart. You will see a screen similar to the following:

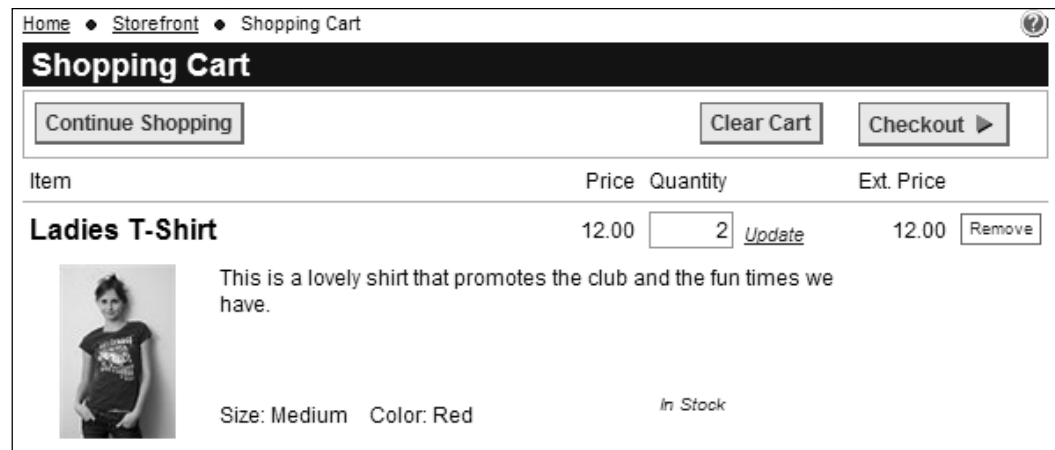


Figure 17.4 – Viewing the Shopping Cart

Buttons at the top of the shopping cart allow you to continue shopping, cancel the process (which empties your cart and returns you to the Home page) or begin the Checkout process.

Each product in your shopping cart is shown with its title, photo and short description, together with the variation selected. The price is shown together with a Quantity field and extended price. (Note that prices may be different for members and non-members; members must login to receive member pricing.) To change the quantity ordered, edit the number and click the Update link. To remove an item from your shopping cart, click the Remove link.

For digital content that is downloaded rather than shipped, the Quantity field is grayed out; you cannot buy multiple copies of a digital product.

## CHECKOUT

When you click the **Checkout** button, you will see a screen similar to the following:

Home • Shopping Cart • Checkout

### Checkout

Please enter your contact information, then click the "Continue with Checkout" button. On the next page, you will be able to use this address for shipping, or ship to different address if you wish.

Association Member? [Login to check out with member pricing](#)

Have you previously placed an order or are you on our mailing list? [Click here to search](#)

In addition to your name, please enter your address, phone number and email address. This will allow us to contact you if necessary.

First Name

Middle Initial

Last Name

Address 1

Address 2

City

State/Province

Zip/Postal Code

Country  [Show All Countries](#)

Phone

Email Address

Organization

Title

Figure 17.5 – Checkout for non-members

If you are a member but have not yet logged in, this screen allows you login to continue the checkout. Pricing may change once you have logged in. (If you are a member who has already logged in, this screen is skipped.)

If you are not a member but have previously ordered products, click the link to find yourself in the database. The system will display a screen similar to the following:

Home • Shopping Cart • Checkout

## Checkout

Please enter your contact information, then click the "Continue with Checkout" button. On the next page, you will be able to use this address for shipping, or ship to different address if you wish.

Association Member? [Login to check out with member pricing](#)

**Enter the following**

Email Address

Last Name

Figure 17.6 – Find your non-member record

Enter your email address and first name and click **Search**. If your information is found, the name and address fields will be populated.

If your information was not found or if you have not previously ordered from the storefront, you will next enter your contact information.

Click **Continue with Checkout** to proceed to the next page or **Return to Cart** to return to your shopping cart without checking out. You can also click **Cancel** to cancel your checkout and your shopping cart completely.

### Checkout Final Screen

When you click **Continue with Checkout** (or if you are a member already logged in), the following screen is displayed:

Home • Shopping Cart • Checkout

## Checkout

### Shipping Info

Shipping Method USPS ▾

Send To The Address Just Specified ▾

Shipping Address

Name Dan Ehrmann ◆

Organization

Title

Address 1 5005 Newport Drive

Address 2 Suite 203

City Rolling Meadows

State/Province Illinois ▾

Zip/Postal Code 60008

Country UNITED STATES ▾

### Gift

Is this a gift? ☒ Yes ☐ No

Gift Message

### Order Summary

Base Cost	13.50
Sales Tax	0.57
Shipping & Handling	8.00
Final Cost	22.07

Cancel X Continue To Payment ►

Figure 17.7 – Checkout final screen

Specify a shipping method from among the available methods defined by your club and association. Once this is done, the order summary panel will be updated to reflect the shipping and handling cost, any sales tax and the total cost for this order. Note that sales tax may be different for different types of products and may or may not apply based on your state or country of residence.

Select a **Send To** option:

- Members can select their primary address or their alternate address, or enter a new shipping address from scratch (for example, for a gift.)

- Non-members can use the address entered on the previous screen or enter a new shipping address from scratch.

Specify if this is a gift and a gift message. The message will be added to the packing list that is printed and included in the box.

Click **Continue to Payment** to complete your order and proceed to the standard ClubExpress payment page. You can also click **Cancel** to cancel your checkout and your shopping cart completely.

## Payment Screen

When you click **Continue to Payment**, you will see a screen similar to the following:

Home • Make Payment

### Make Payment for Dan Ehrmann

The list below shows outstanding payments due. Use the checkboxes to select which payments you wish to make. Then, make a choice in the "Select Payment Method" dropdown list. If you elect to pay by credit card, enter the required information, and press the "Submit Payment" button. Please allow a minute or so for your transaction to complete.

If you prefer to pay by check, select the "Print Invoice and Send Check" option and press the button with the same name. A printable version of the page will be displayed which includes instructions on how to make out your check and where to mail it.

Fields marked \* require an entry.

☒ **Purchase Product** (4/8/2009) Due \$ 22.07 Pay \$ 22.07

Baseball Cap (Small)	13.50
Sales Tax	0.57
Shipping/Handling	8.00
<b>Transaction Total:</b>	<b>22.07</b>

**Total Selected For Payment** **\$ 22.07**

Select Payment Method < Select Payment Method >

Review the payments due, and select the items you wish to pay for now. Then, select a payment type and follow the instructions provided.

**Refund Policy:** The refund policy is set by Big Bend Middle School PTA. If refunds are available, requests must be directed to Big Bend Middle School PTA - they cannot be handled by ClubExpress.

**Submit Payment** **Cancel**

Figure 17.8 – Payment Screen

Each order is a single transaction. This transaction will have multiple line items, one for each item in the order, as well as items for shipping/handling (based on your chosen shipping method) and sales tax (if charged).

Select a payment method then follow the instructions to enter the required information and submit the payment for processing. If you pay immediately by credit card, your order is flagged as “Ready to ship”. If you choose to print an invoice and mail a check, your order cannot be shipped until the check is received and recorded in the system.

## DOWNLOADING DIGITAL CONTENT

If you have ordered digital content, the confirmation email you receive will include a link to your **Download Bank**. This is a list of documents that you can download. It is also available as a link from your member Profile. You will see a screen similar to the following:

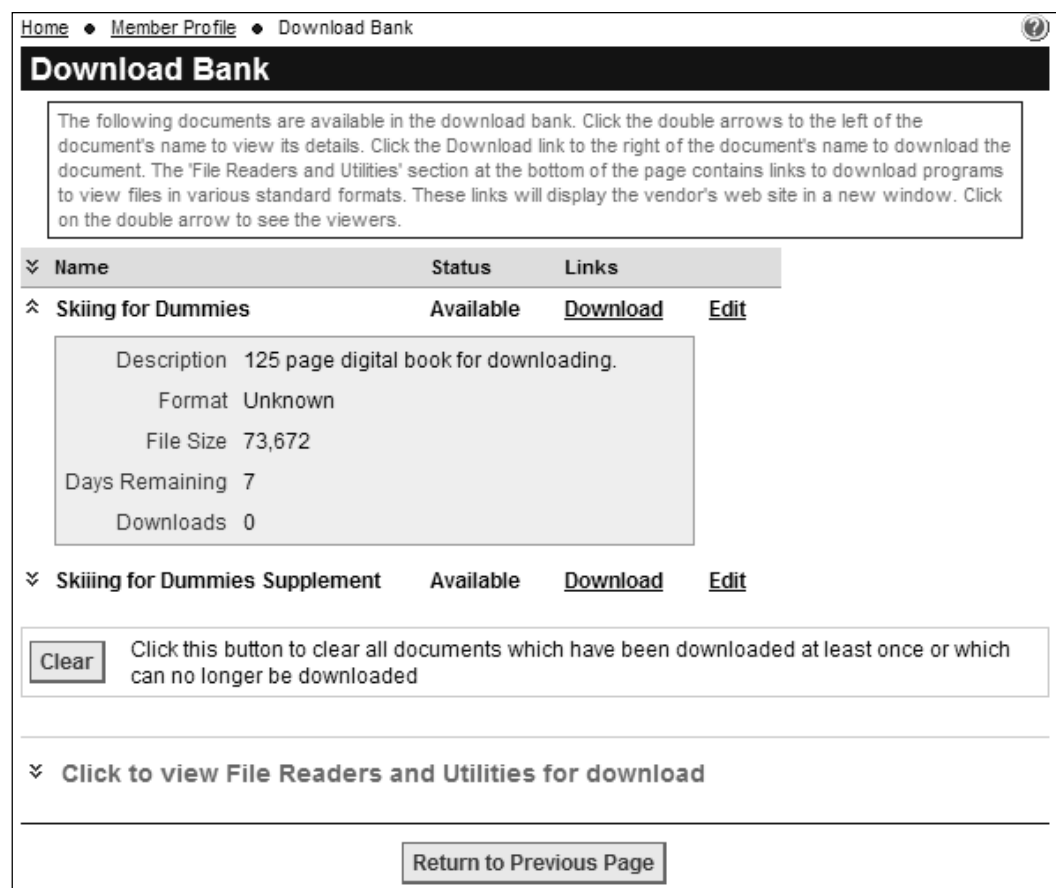


Figure 17.9 – Download Bank

Click the **Download** link to download a document. Click the double-arrow on the left of the title to view details of a document. Click the **Clear** button to remove any document from the list that has already been downloaded at least once or which can no longer be downloaded.

## Chapter 18 – Surveys

### INTRODUCTION

The Surveys module allows you to take surveys organized by your club or association. Surveys are used for many purposes, including learning what types of events members want to attend and which areas of a hobby or profession members are most interested in. They can even be used to vote in elections.

Surveys can be spread across multiple pages and can have any number of questions. Each question can be displayed in one of 15+ formats, and certain types of questions can be grouped together under a single heading.

A typical Surveys screen is shown below:

Figure 18.1 – Surveys screen

This screen shows the surveys available to you. Clicking the **Take this Survey** button launches the survey wizard, presenting the first page of the survey.

### TAKING A SURVEY

Surveys typically begin with a preamble page that explains the purpose of the survey. At the bottom of each page are **Back**, **Cancel**, and **Next** buttons (although Back does not appear on the first page and Next does not appear on the last page.) Use these buttons to navigate between the pages of the survey. If you click the Next or Back buttons and you have not supplied a response to one or more required questions, you will not be able to leave the page until an answer is supplied.

## Chapter 19 – Content Editor

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### **INTRODUCTION**

In a number of places within ClubExpress, you have the opportunity to create a custom web page or part of a page. Two examples are when you are building the website home page and when you are specifying custom web pages.

Instead of forcing you to learn complex HTML coding, ClubExpress makes it easy to build this page, using a software tool called a *content editor* that is similar to a word processor.

The ClubExpress Content Editor allows you to perform the following tasks:

- Select text font, size, and color;
- Specify the bold, italic and underline attributes;
- Select background color;
- Indent and outdent;
- Specify numbered or bulleted lists;
- Insert horizontal lines;
- Insert and resize images;
- Insert links to external websites and email;
- Use your computer's clipboard, including cut, copy and paste;
- Undo and redo changes;
- Insert special characters;
- Insert "smileys", small graphics designed to display an emotion;
- Spellcheck your text;
- View your page in design mode, HTML mode or Preview mode;
- Zoom the text for finer control;
- Print the text being edited;

More experienced web designers can view and modify the underlying HTML code created when you edit pages with this tool.

## USER INTERFACE

When you view the Content Editor on the Profile – Membership Directory screen, or when you create or edit a forum message in the Discussion Forums module, you will see a window similar to the one below:

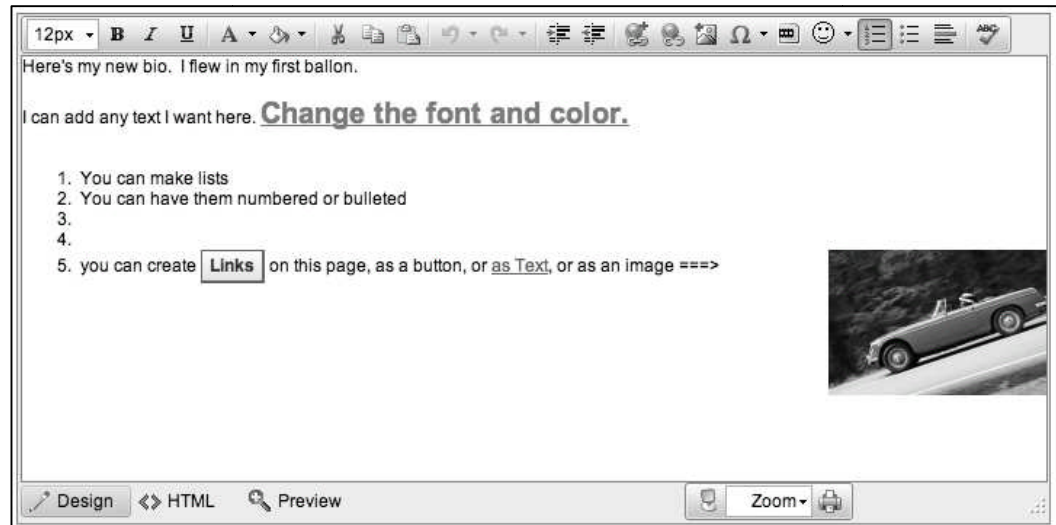


Figure 19.1 – Editing your Member Bio or a Forum Message

At the top of the screen is a toolbar of buttons, with similar functions grouped logically. The meaning and behavior of each button is described below. Underneath is the edit area, where you type text, highlight blocks, manipulate tables and images and perform other editing functions. At the bottom of edit area is another toolbar with special functions, then a word and character count.












Many functions work on a block of text that has been highlighted by dragging the mouse cursor over the text. The editor also supports “Drag-and-Drop” to move highlighted text from one part of the page to another.













Click **Save** to save your changes or **Cancel** to discard them. You will be asked to confirm a Cancel operation. Both buttons close the window and return you to the previous screen.

**Important Note:** You should save your work every 15-20 minutes to maintain the currently logged in session. If you don’t do this, the system may close the active session and you risk losing all your work. This session timeout varies based on your level of access (for administrators, it’s 60 minutes.) The system will give you a warning approx. 5 minutes before a session is due to expire.

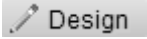



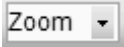

## TOOLBAR FUNCTIONS

The following table explains each toolbar button. Many use the same icon and perform the same function as a typical word processor such as MS Word. Some functions require a more detailed explanation; these are described in the following sections:

	Click the drop-down arrow to select a text size. You will see a list of sizes based on pixels; 12px is the standard size.
	Click to bold the current block of text or to start bolding from the cursor position. [Ctrl-B] also works.
	Click to italicize the current block of text or to start italicizing from the cursor position. [Ctrl-I] also works.
	Click to underline the current block of text or to start underlining from the cursor. [Ctrl-U] also works.
	Click to select the text (foreground) color. A color picker showing standard colors will be displayed. You can also define custom colors and add them to the palette. Your change applies to the current block of text or at the cursor position.
	Click to select the background color. The same color picker described above is displayed.
	Cut the highlighted text to your computer's clipboard. The shortcut key [Ctrl-X] performs the same function.
	Copy the highlighted text to your computer's clipboard. The shortcut key [Ctrl-C] performs the same function.
	Paste text from your computer's clipboard at the current cursor position. The shortcut key [Ctrl-V] performs the same function.
	Undo one or multiple changes. The shortcut keys [Ctrl-Z] and [Alt-Backspace] perform the same function. Click the reverse arrow to undo the last change or the small down arrow to select which changes to undo.
	Redo the previous Undo. The shortcut key [Ctrl-Y] performs the same function. Click the forward arrow to redo the last undo, or the small down arrow to select which undo point to reverse.

	Indent the current line or block 1 tab stop.
	Outdent the current line or block 1 tab stop.
	Click to insert a hyperlink to another ClubExpress module, an external website, an email address or an anchor (bookmark within a page.) The shortcut key <i>[Ctrl-K]</i> performs the same function. For more information, see the special section below.
	Break the current hyperlink, removing the special linking code behind the scenes. The current hyperlink will revert to standard text. The shortcut key <i>[Ctrl-Shift-K]</i> performs the same function.
	Insert an image from your graphics library and other club-level photos (for example, logos). For more information, see the special section below.
	Insert a Special Symbol. Click the small drop-down arrow to display a popup window of special characters. Click a character to insert it in your text.
	Insert an audio, video or Flash image, or a reference to a YouTube or Vimeo video.
	Insert a “smiley” (aka an “emoticon”), a small graphic to indicate an emotion. Click the small drop-down arrow to display a popup window of smileys. Click one of them to insert it in your text.
	Click to begin a numbered list of items.
	Click to begin a bulleted list of items.
	Click to insert a horizontal rule across the page.
	Spellcheck your text. A popup dialog will appear to highlight misspellings and other errors. See the section below for more details. The shortcut key <i>[F7]</i> performs the same function.

## Options at the Bottom

 Design	Design View. This is the normal view where you write your text and use the shortcut keys and toolbar buttons to insert options and format your text.
 HTML	HTML View. This view allows you to see and edit the underlying HTML source code.
 Preview	Preview. This view allows you to see the page as it will generally look when it's being viewed.
	Full Screen Mode. This mode makes the edit box slightly larger by hiding all non-editor controls.
 Zoom	Zoom. Click the drop-down arrow to zoom your text in to see more detail or out to see more of the page.
	Print. Click this icon to print the current page being edited.

## Summary of Shortcut Keys

Ctrl-X	Cut the highlighted text to the Clipboard
Ctrl-C	Copy the highlighted text to the Clipboard
Ctrl-V	Paste from the Clipboard at the cursor position
Ctrl-B	Bold the highlighted text or start/stop bolding
Ctrl-I	Italicize the highlighted text or start/stop italics
Ctrl-U	Underline the highlighted text or start/stop underline
Ctrl-Z	Undo the last operation
Ctrl-Y	Redo the last operation
Ctrl-F	Find or Find and Replace
Ctrl-A	Select All - highlight everything
Ctrl-P	Print the text in the window
Ctrl-K	Insert Hyperlink at the cursor
Ctrl-Shift-K	Break the hyperlink at the cursor
F7	Launch the Spellchecker
F1	Display popup help for the editor
Ctrl-W	Close the editor window

## HYPERLINKS

Clicking the **Insert Link** toolbar button displays the following popup window:

**Build a Link**

The "Link Type and Address" panel allows you to create various types of links: to a page within your web site; to an external web page; to an email address; or to an anchor within the current web page. First, select a link type. One or two additional choices will appear based on the selection you have made. Make your selection, then go to the "Link Properties" panel to specify the appearance of the link. A link may be displayed as text or an image. Enter the link text, or select an image, as appropriate. For web page links, you can specify whether the destination will appear in a new window or in the current window.

**Link Type and Address**

Link Type: Built-in Module

Built-in Module: Forums

**Link Properties**

Link Display Type: ☒ Text ☐ Button ☐ Image

Link Text: Forums

Target Window: ☒ Same Window ☐ New Window

Save Cancel

Figure 19.2 – Build a Link

The link builder supports five types of links:

1. **Document** – This is a link to a document stored in your documents module. The next field is a drop-down list of categories; once you select a category, you can select a document within that category.
2. **External Page** – This is a link to a web page stored on another website. The next field will prompt for the External URL, the address of the website you wish to go to.
3. **Email Address** – The next field will prompt for the Email Address.
4. **Anchor** – Place a named anchor at the cursor.
5. **Link to Anchor** – Select the "Link To Anchor" option to create a link to an anchor within the page (for example, from a mini-index at the top of the page down to a section heading, or from the end of a section back to the top of the page.)

Links can be represented in three ways, using text, a ClubExpress-style button or an image. If you select **Text** or **Button**, the next field prompts for the text to be used. If you select **Image**, the field is replaced by a button that displays the ClubExpress Select an Image window, described in the following section.

For linking to another ClubExpress module, a custom web page or a photo page, or an external website, you also have the option of having the target page appear in the same window (customary for another ClubExpress module, web page or photo page) or a new browser window (customary for linking to an external website.)

Click **Save** to save your changes or **Cancel** to discard them. Both buttons close the window and return you to the page editor.

## INSERT PHOTO

Clicking the **Insert Photo** toolbar button displays the following popup window:

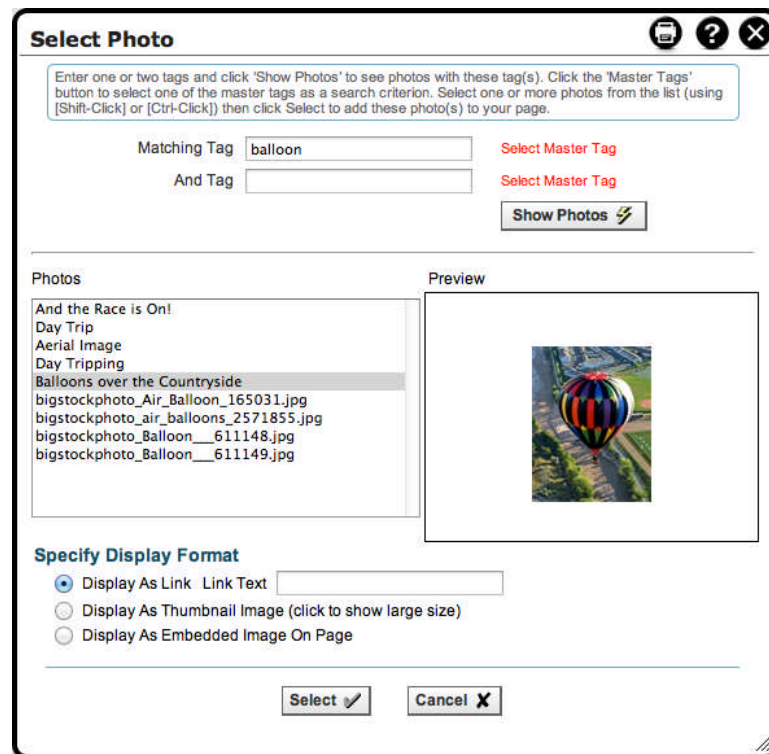


Figure 19.3 – Insert Photo

Enter one or two tags and click the **Show Photos** button to display a list of photos with these tags. As you click on a photo, a preview is shown in the right panel. You can also *[Shift-Click]* and *[Ctrl-Click]* to select multiple photos at a time, but the preview panel will only show the first selected photo in the list. Photos can be inserted into your custom page in one of three ways:

- As a hypertext link. You have the option of specifying the text to use. When the link is clicked, a popup window will appear showing a larger version of the photo.
- As a thumbnail image (with the longest dimension set to 120 pixels). When the image is clicked, a popup window will appear showing a larger version of the photo.
- As an embedded image on the page (with the longest dimension set initially to 450 pixels.) You can adjust the size of the image using the handles provided.

Click **Select** to insert the image(s) as defined, or **Cancel** to close the dialog without inserting any images.

## **INSERT IMAGE**

Clicking the **Insert Image** toolbar button displays the following popup window:



Figure 19.4 – Insert Image

From this window, you can select graphics files already uploaded (“Club Web Graphics”) or standard graphics within the current theme (“Theme Graphics”), or you can upload a new image.

Unlike photo libraries of club activities or member collectibles, these images represent graphics and photos which are part of your website or which represent official club images (such as logos, graphical tag lines, affiliate logos, awards, and other special images.)

To upload an image, click the **Browse...** button and navigate to the file on your local hard disk or network. Select the file, then click **Upload Image** to upload it into ClubExpress. It will appear in the **Image Files** list. Highlight the file name and it will appear in the Preview panel. If it's the right one, click **Select** to place it on your page.

**Important Note: Only upload photos that you have the right to upload (i.e. you hold the copyright or the copyright holder has granted permission for the photo to be uploaded.) If you upload photos without permission of the copyright holder, you run the risk of being sued for unauthorized use of copyrighted material.**

## Editing Image Properties

To edit the properties of an image, click it so that selection handles appear. Then right click and select **Properties**. You will see the following dialog:

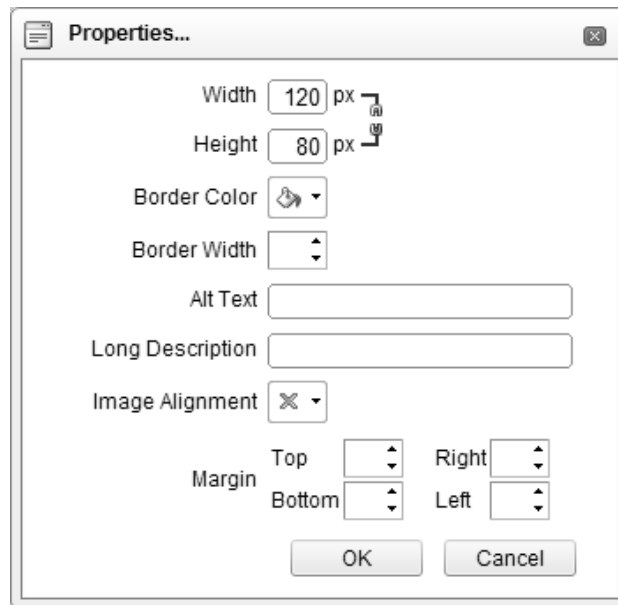


Figure 19.5 – Set Image Properties

From this window, you can perform the following functions:

- Specify the width and height of the image in pixels. The system does not maintain the relative dimensions of an image unless you first click the broken “chain” image to join the two fields.
- Specify a border color and width for the image in pixels. If this parameter is left blank, it defaults to zero.
- Specify alternative text for users who have images turned off in their browsers.
- Specify the alignment of the image. Some of the options in the list do not apply to an image sitting on its own line; instead, they control the positioning of the image when it’s next to text.
- Control the horizontal and vertical spacing around the image, also specified in pixels.

## ***INSERT AUDIO/VIDEO/FLASH***

When you click the **Insert Audio/Video/Flash** icon, you will see a small drop-down menu. The first choice allows you to insert an audio, video, or Flash file uploaded to the website at the cursor position, while the second choice allows you to insert a link to a YouTube or Vimeo video which will then play within your website.

### Uploading and Playing Media Files

Selecting the first choice displays the following dialog:

**Insert Audio/Video**

Audio/Video/Flash files need to be uploaded to a folder in the Documents module before they can be selected on this dialog. Select a Documents module folder then a file from that folder.

**Select File**

File Source ☐ Upload New File ☒ Select Existing File

Source Folder Various clubs media files

Select File AYL-Video.avi

**Audio/Video Properties**

File Type Audio Video Interleave File

Width 450 px

Height 300 px

Auto Play ☐

Insert Cancel

Figure 19.6 – Insert Audio, Video, Flash

Select the first radio button to upload a new file and store it in a folder within the Documents module. Select the destination folder and the file from your local hard disk. Click the second radio button to select a folder and a file from that folder that was previously uploaded.

The system will detect the file type and give you an error if a non-supported file was uploaded. For video and Flash files, specify the width and height for the panel; this information can often be found in the file properties window of the file on your local hard disk. For audio files, specify the width of the audio control panel only. You can also check the **Auto Play** box so that when the page is displayed, the sound or movie file will start playing automatically, instead of waiting for the user to click a Play button.

Click **Save** to place the media file on the page, or **Cancel** to return to page editing without placing the media file.

The following file formats are supported. However, please note that some browsers and platforms (PC, Mac and Linux) may require special add-ins to support certain file types. For example, Mac users will not be able to view Windows-based formats without a special QuickTime add-in.

- SWF (Flash movie)
- FLV (Flash video)
- WMV / WMA / AVI (Windows Media video/audio)
- MPG / M2V (older style MPEG video)
- QT / MOV (Quicktime movies)
- MP3 (Audio file standard)
- WAV (Windows sound file)
- AAC (Apple Audio Codec, used by iTunes)

### Embedding a Linked YouTube or Vimeo File

Select the second radio button to display a simple text box into which you can paste code copied from YouTube or Vimeo (or any other website which supports embedded links and which allows you to copy a code block into your clipboard.)

In YouTube, look to the right of the video for the “Embed” box. You can also click the “Gear” icon beside the Embed box to display a panel with additional options, including whether or not a border should be displayed (and its color), and the video size.

In Vimeo, the `</>` Embed button appears when you move the mouse over the video panel itself. Click the button to display a popup dialog. Highlight the code block directly and use the computer’s Copy function.

Paste in the code block then click **Save** to save your change, or **Cancel** to close the dialog and return to the editor without saving.

## SPELL CHECKING

Clicking the Spell Check toolbar button switches the editor into “Spell checking mode”:

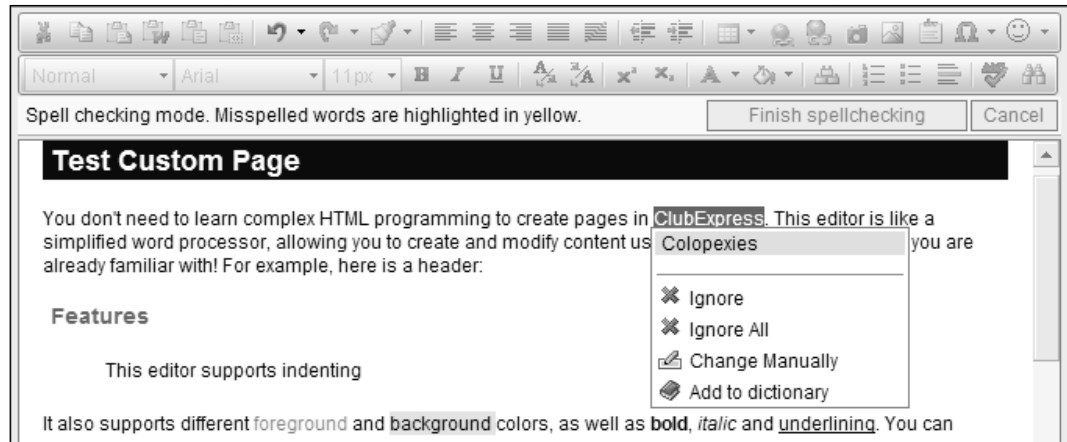


Figure 19.7 – Spell Check Dialog

Misspelled words are highlighted in yellow. There is a small popup menu below the first misspelled word, showing available options:

- Other words which might be what you intended to write;
- Ignore just this occurrence;
- Ignore all occurrences;
- Change manually. A small window will appear to edit the word.
- Add to dictionary, so that this spelling will be OK from now on.

Click the **Finish spellchecking** button to exit from spellchecking mode. Click the **Cancel** button to cancel your changes and exit spellchecking mode.